# Repairline User Guide

Contents

# 1. Repairline / How to Start/Set up

Keep track of your Service Cases

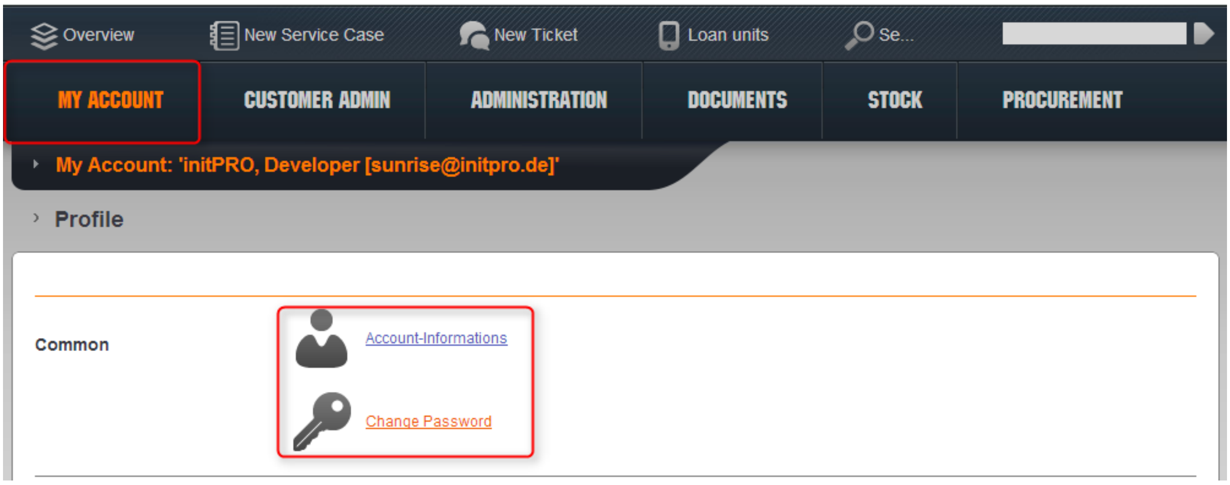
The extensive online tool for flexible handling of service and repair brings your workflow into line and repaired equipment back to the client as quickly as possible – for repair service provider, merchants and manufacturers.

## How you **CAN** start:

All steps will be explained in detail in the sections 2. - 13.6.

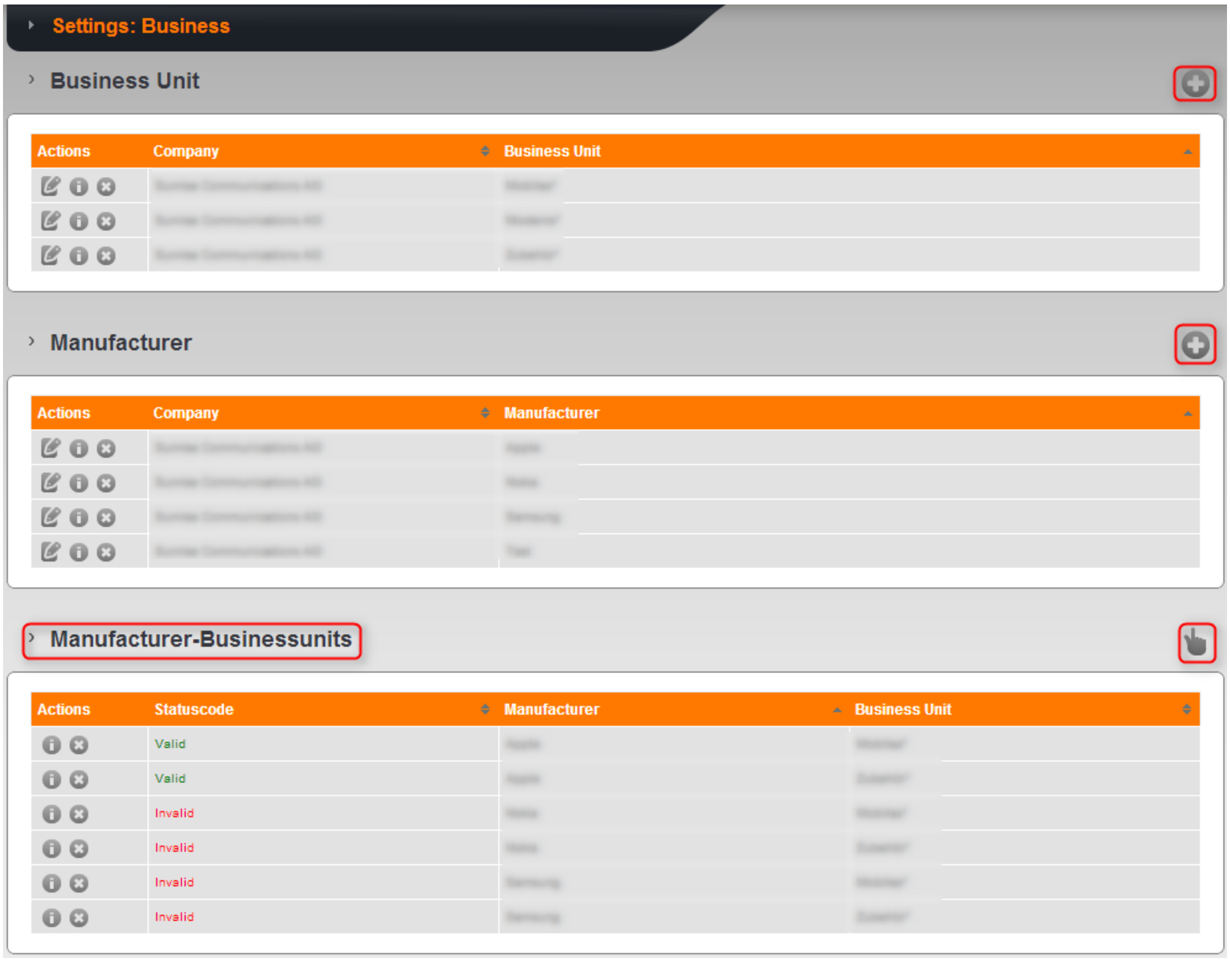
First of all you have to log on at system.repairline.de by entering your username and your password that you received from us. Register online: repairline.de/index.php/en/testing-en


Now you can change the password by clicking on "**My Account**" – "**Change Password**" and right after that enter your company´s account-information´s by clicking on "**Account-Informations**".



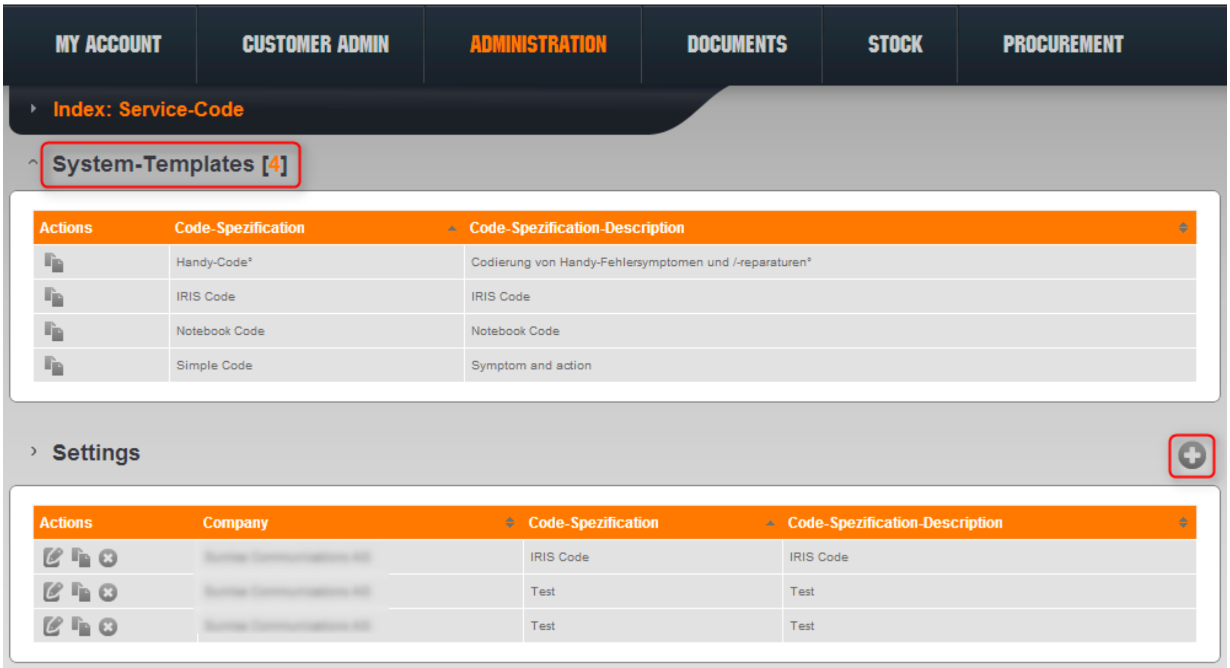

*(Described in detail in 8.1 and 8.2)*

Now you should set up your Business Process configuration. For this you have to click on “**Administration – Business – Settings**”. Now create your Business Units by clicking on the “<u>Add</u>” icon on the right. After that crate your Manufacturer´s by clicking on the other “<u>Add</u>” icon and set the Manufacturer-BusinessUnits relations. The Manufacturer-Businessunit list will be created automatically. You also assign the Workflows and Service-Codes to the Manufacturer-BusinessUnits.



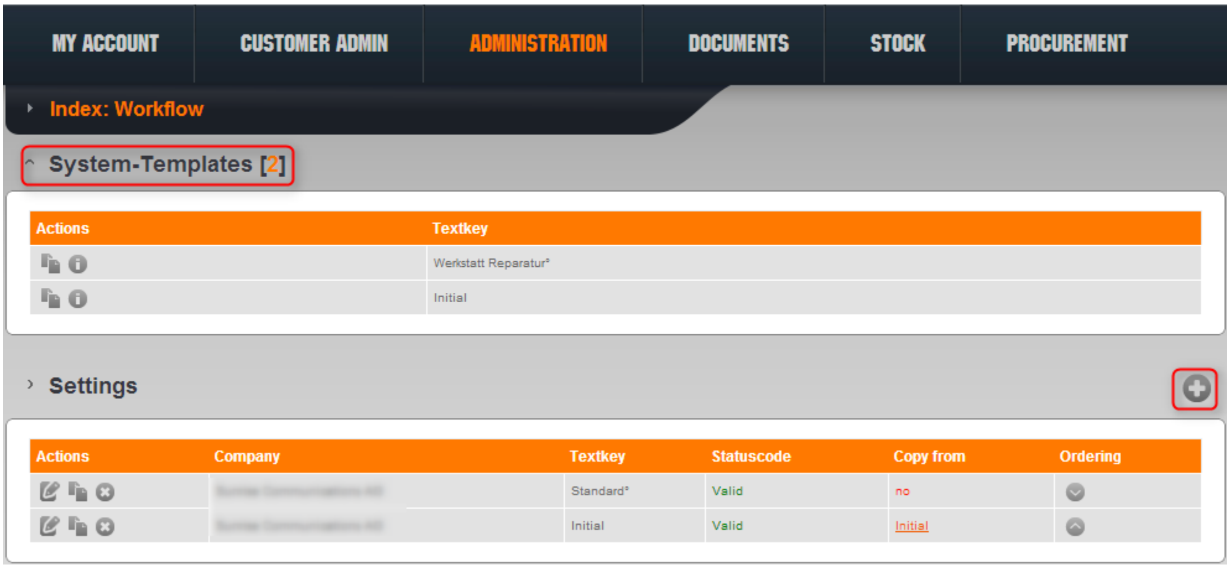

<u>*(Described in detail in 10.13)*</u>

Up next is the Service-Code. To create Service-Codes click on “**Administration – Business – Service-Code**”. Service-Codes serve as structured documentation and documentation of failure -symptoms -states and made repairs. You can use either one of the 4 System-Templates and change them the way you want or you can even create your one Service-Code! This allows you a manufacturer-independent service execution.




*(Described in detail in 10.11)*

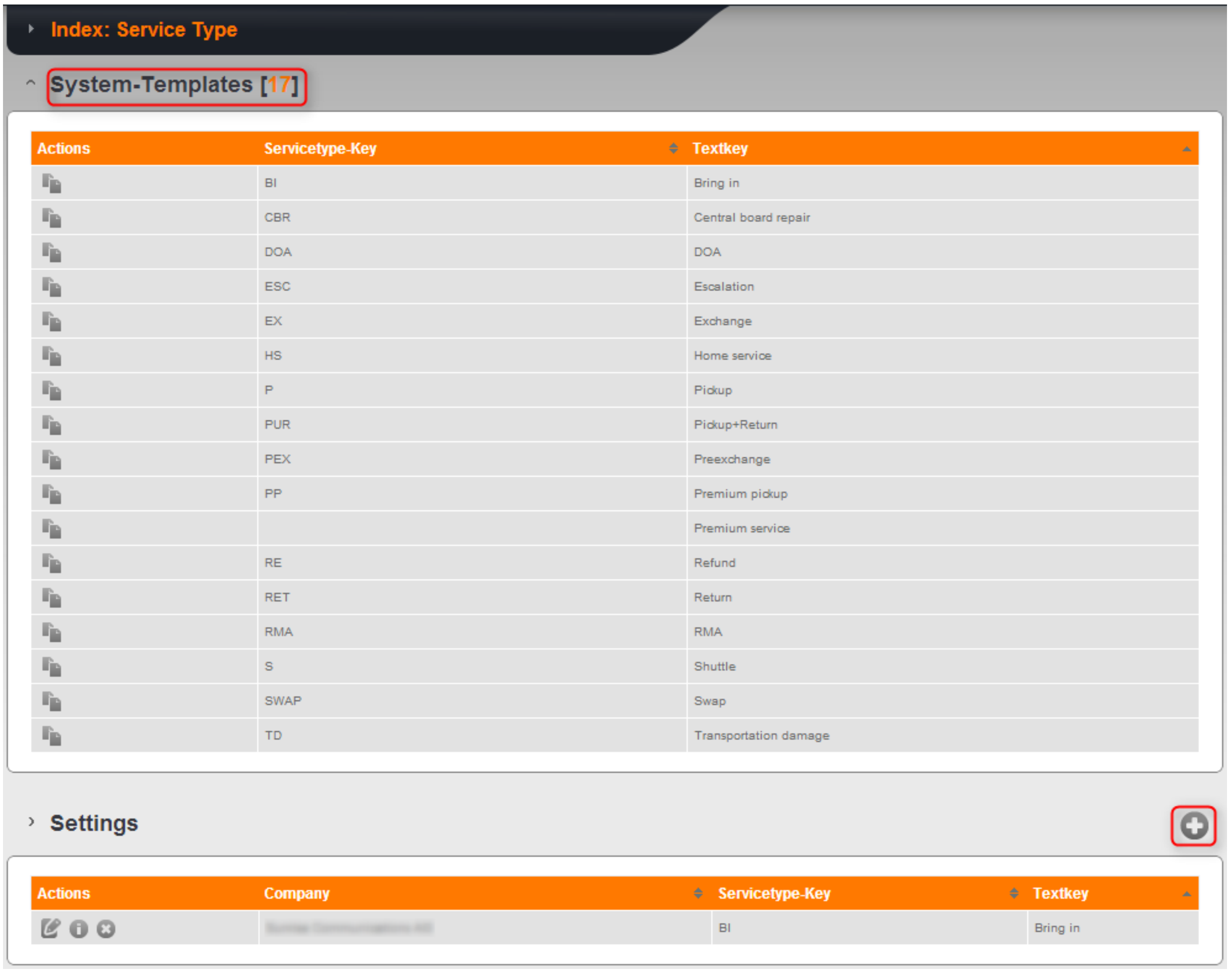
Now click on "**Administration – Business – Workflow**" to confirm your Workflows. The Workflow is the actual repair process that is performed the same or similar for repairs. You can use either one of the System-Templates and confirm them the way you want or you can even create your one Workflow!




*(Described in detail in 10.12)*

Now you should select your Service Types. The service type determines which repair services are offered to the customers. Click on "**Administration – Business – Service Type**". And

again there are a lot of System-Templates that you can use. If the needed Service Type is not listed in the System-Templates you can create your own.

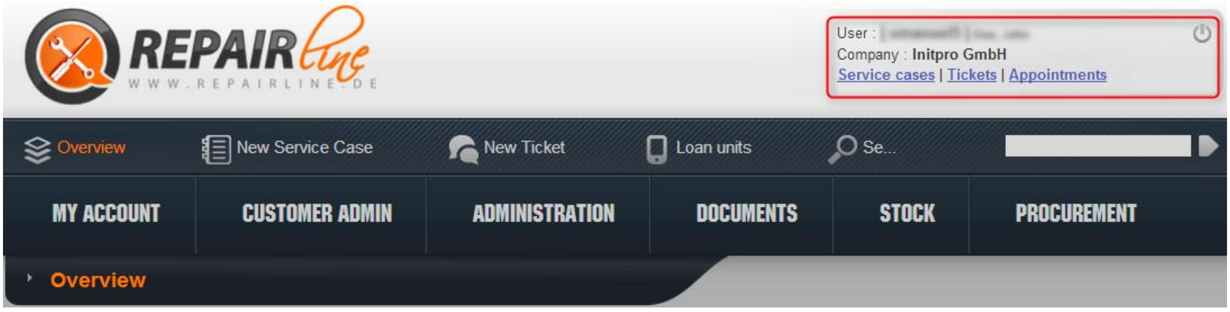



*(Described in detail in 10.15)*

Now you have the minimal together to create a Servicecase.

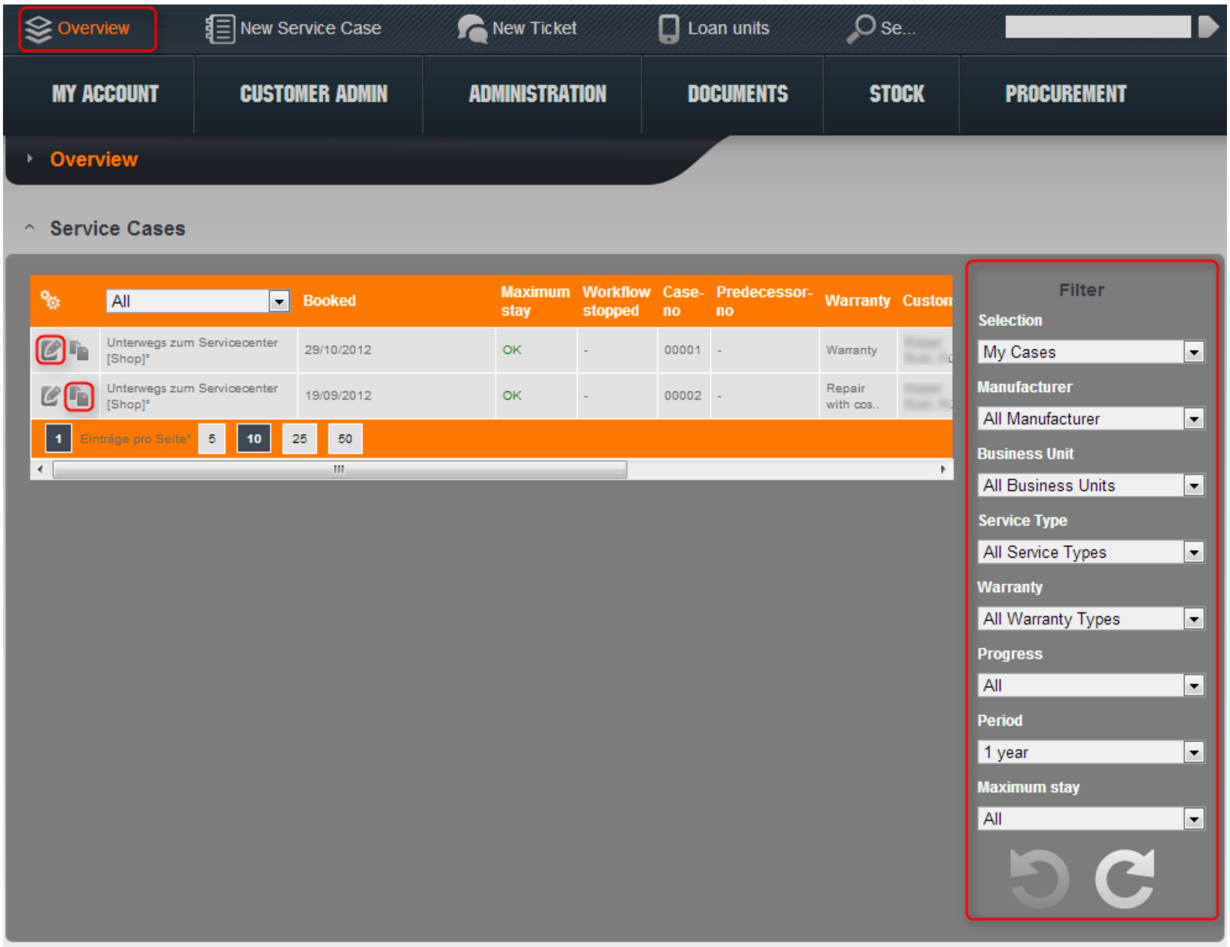
# 2. Info-Panel

The Info panel shows you under which user / company you are logged in. You also be quickly accessed via the Info panel to all the information about your service cases, tickets and client meetings. By clicking on service cases, tickets or client appointments appear a detailed overview. In the information panel is at the top right a "Logout" icon, click on this icon to log out.




# 3. Overview

Under the menu item "**Overview**" you can get a quick and easy overview of your Servicecases, tickets and customer meetings. Set the filters as desired and click the "Apply" icon (the icon on the right). Now the desired Servicecases / Tickets / Customer Meetings will be shown and can be edited by clicking on the "Edit" icon. If there is a Servicecase that is similar (for example same Manufacturer – Businessunit and Costumer) to a new Servicecase you can create a new Servicecase “Clone” that will save you time. To reset the filter's settings, click the "Reset" icon (the icon on the left).

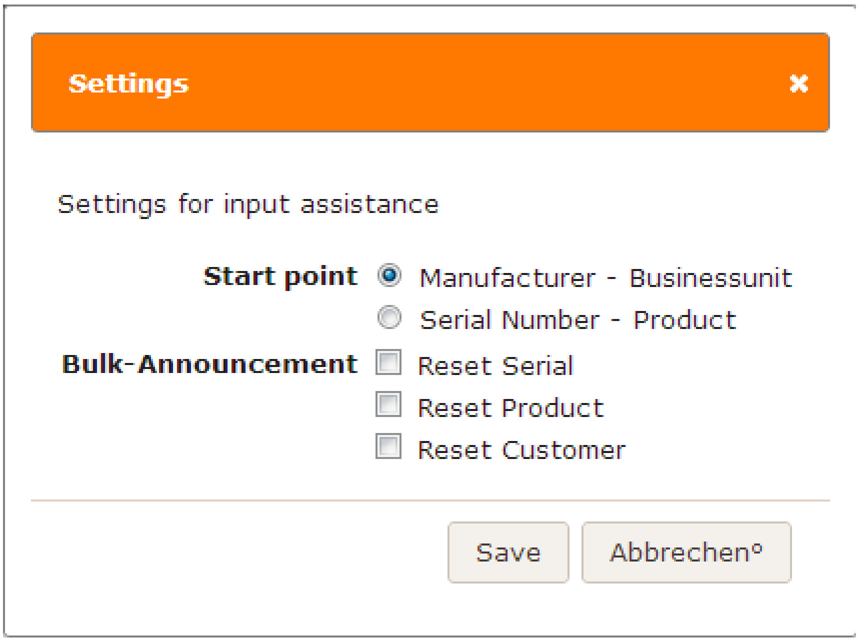


# 4. New Servicecase

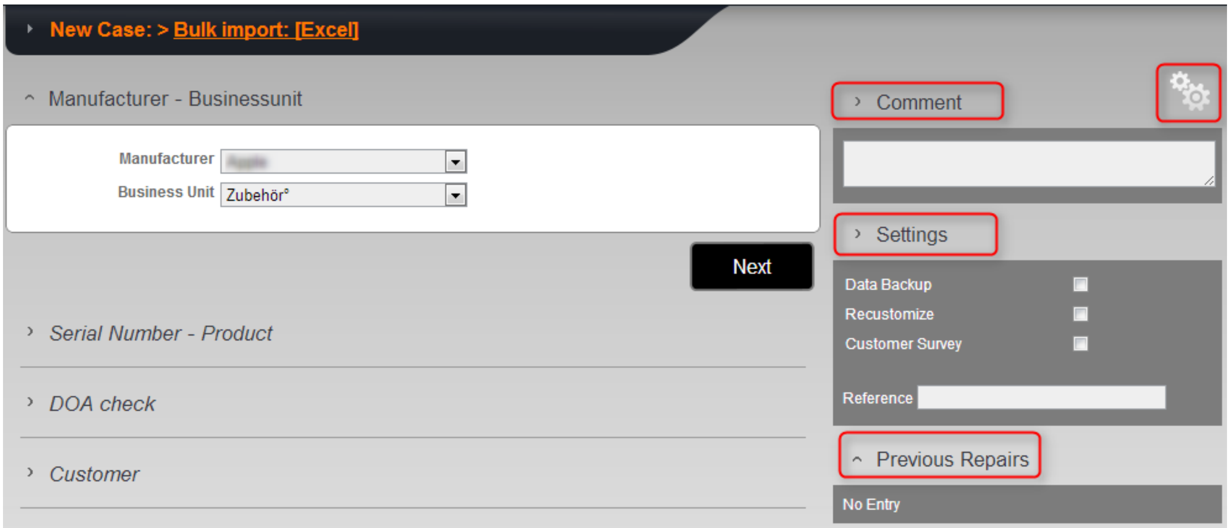
To add a new service you have to click on "**New Service Case**".

By using the Servicecase-Input-Assistant, you can enter all the relevant details of a repair order in only few steps. The Input-Assistant can be configured according to your wishes. This allows for example a rapid mass capture of Servicecases.

Click on the "Settings" icon (on the right top) to set the current settings of the Input-Assistant. You can select the start point of the Input-Assistant and confirm the Bulk-Announcement by setting a check mark to the chosen section. This section will be reset for each new Servicecase.

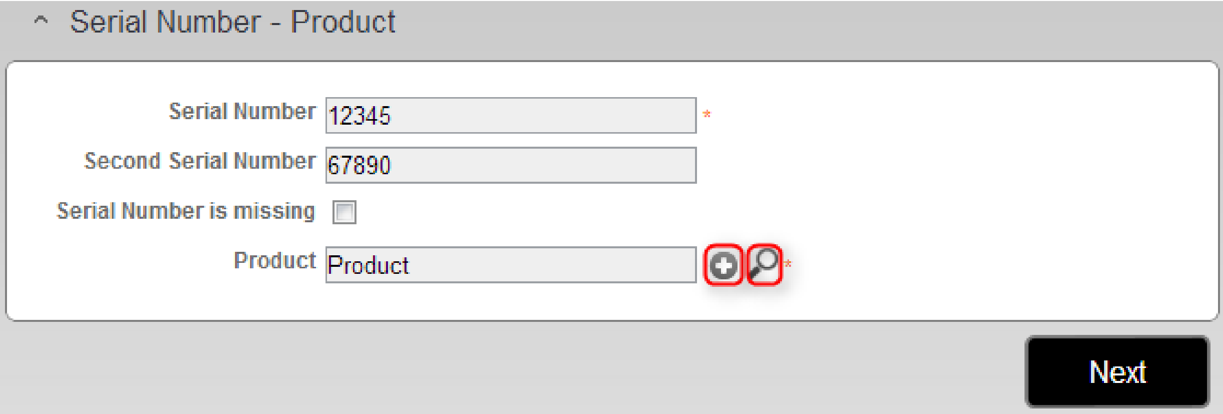



You have the option to write a comment to each Servicecase and select settings (such as Data Backup, Recustomize, Customer Survey, Reference) and see the Previous Repairs.



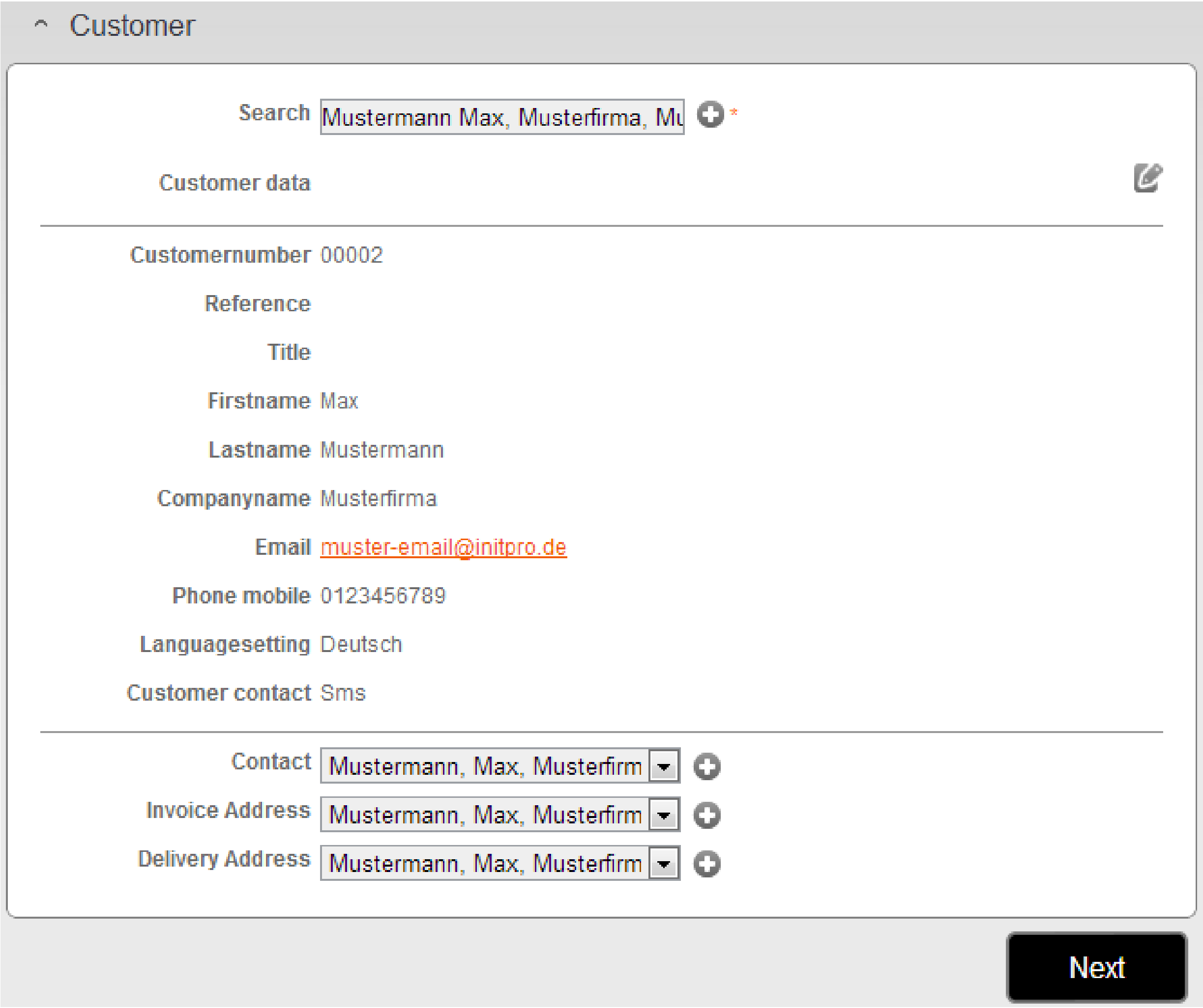
The entry of the Servicecase:

At first select the Manufacturer and the Business Unit of the device and click on “Next”. Enter (if available) the serial number (and the second serial number) of the product that has to be edit. If the serial number is not available place a checkmark next to "Serial Number is missing” (either the serial number must be given or serial number is missing must be set). Now enter the name of the product (mandatory item). In order to receive a product from your product list, click on the "Loupe" and select the desired product by clicking on it. If the wanted product is not listed in your product list, you have the option of creating the product while you are recording the Servicecase. For that you have to click on the "Add" icon. If you have selected the Serial Number and the Product click on “Next”.

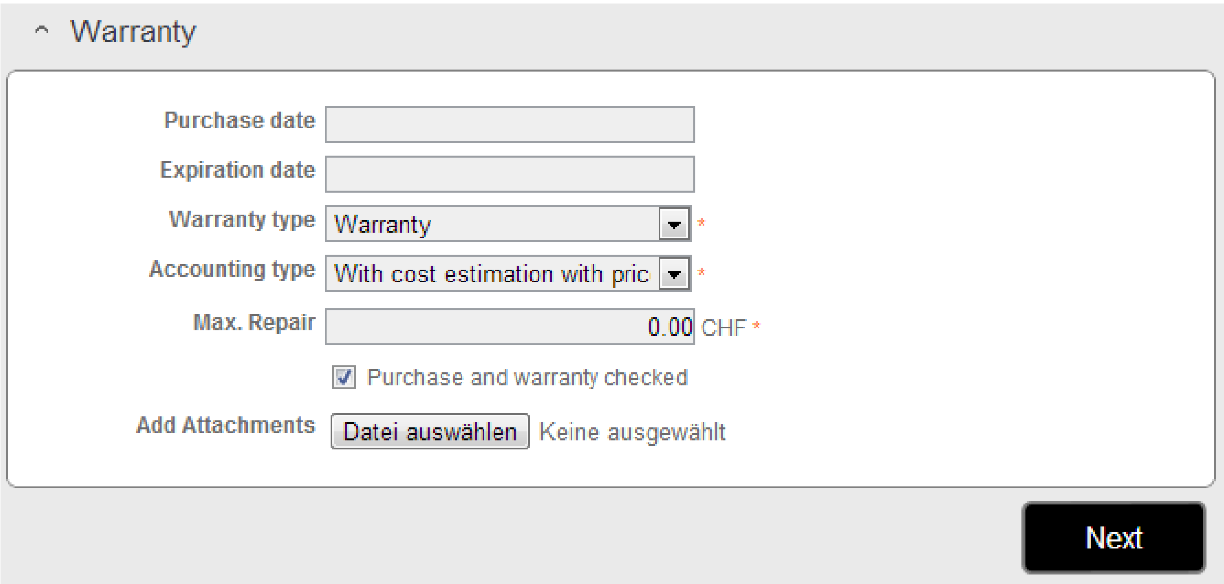



Specify the Service Type for this repair and click on “Next”.

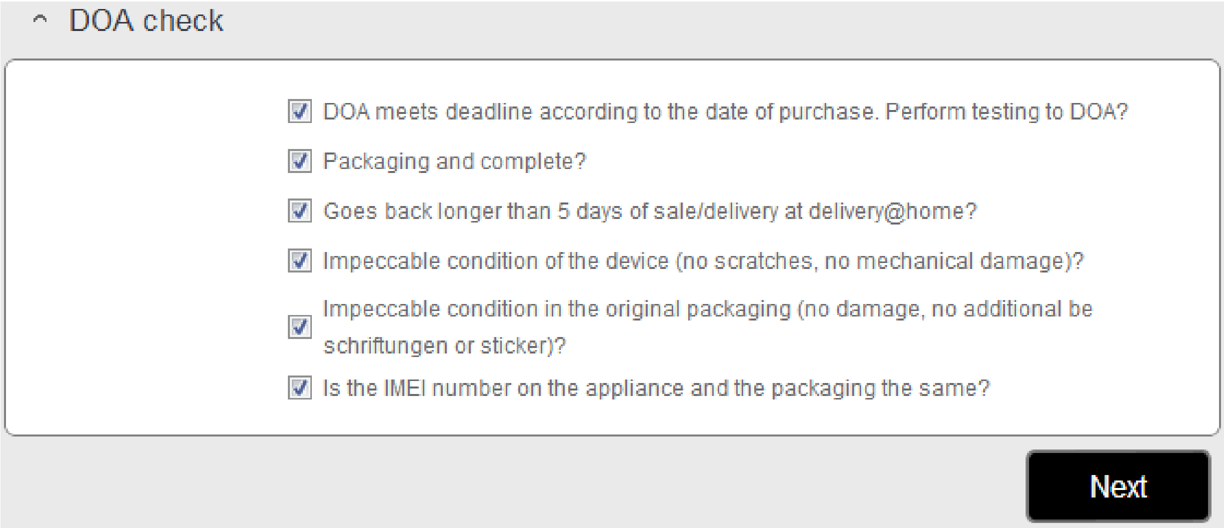
Enter the customer's name in the search bar. If the customer is already known the name and address of the customer will appear. Click on the displayed customer. If the customer is not registered as a customer yet, click on the "Add" icon to create the new customer. After the customer has been selected the customer information’s will be shown. Now you can select Contact, Invoice Address and Delivery Address. If the information’s of costumers are not up-to-date you can update them by clicking on the “Edit” icon. When all of the information’s are correct then click on “Next”.

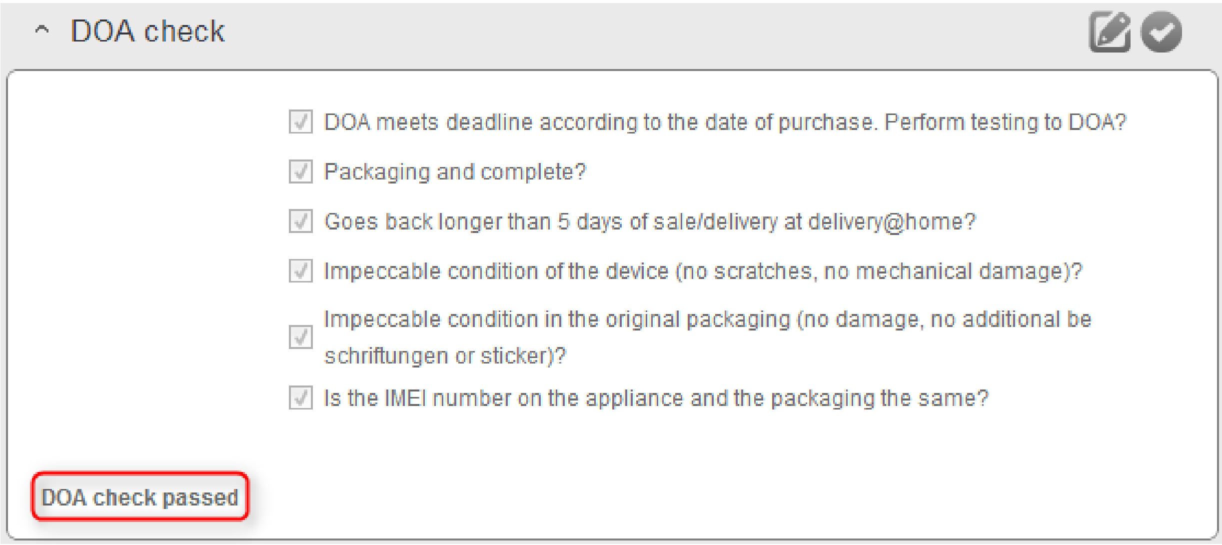



Select the Warranty Type (for example warranty or repair with costs) and enter the date of purchase and the expiration date. If the correctness of the accounts and warranty could be checked, please put a check mark for confirmation. You also have the option of adding facilities (for example till receipt). Click on "Next".

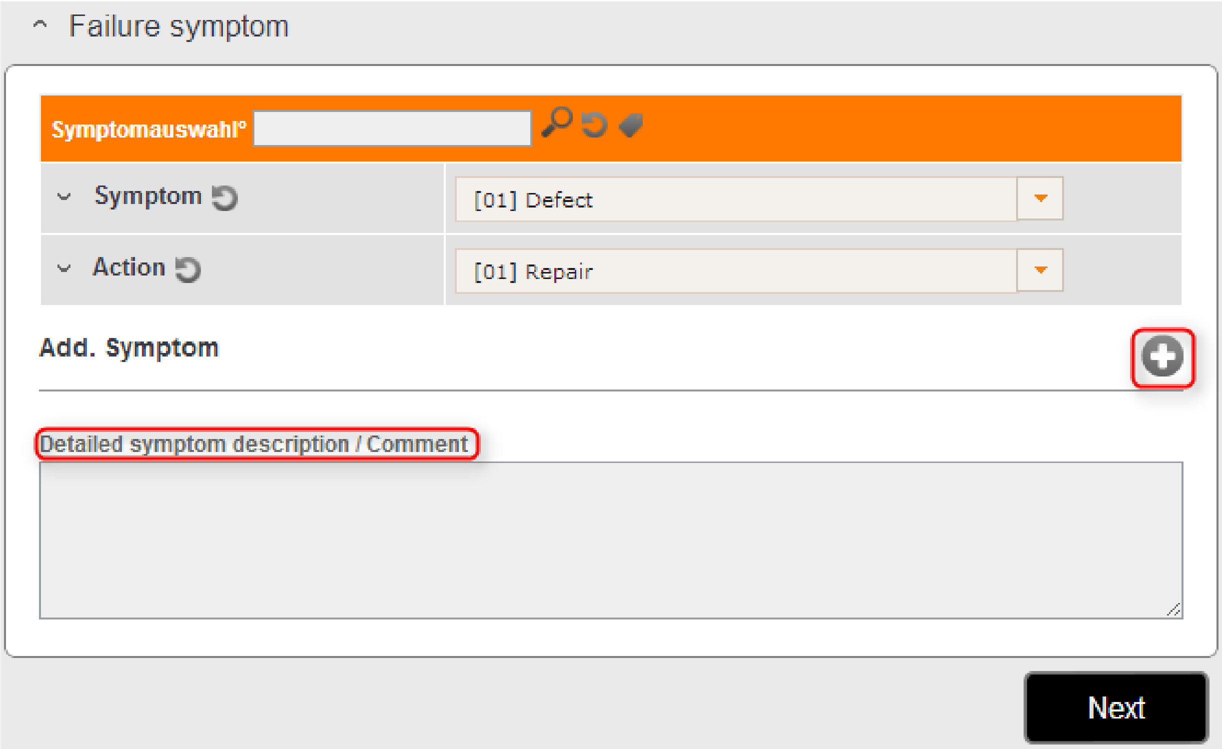


The DOA-check will set the Servicecase as DOA-check passed or rejected. If the statement of the DOA-check that is true set a checkmark and the next statement of the DOA-check will appear. If a statement is not true, click on “Next” and the Servicecase will be set as DAO-check rejected. If all the statements of the DOA-check are true and all checkmarks has been set click on “Next” and the Servicecase will be set as DOA-check passed.

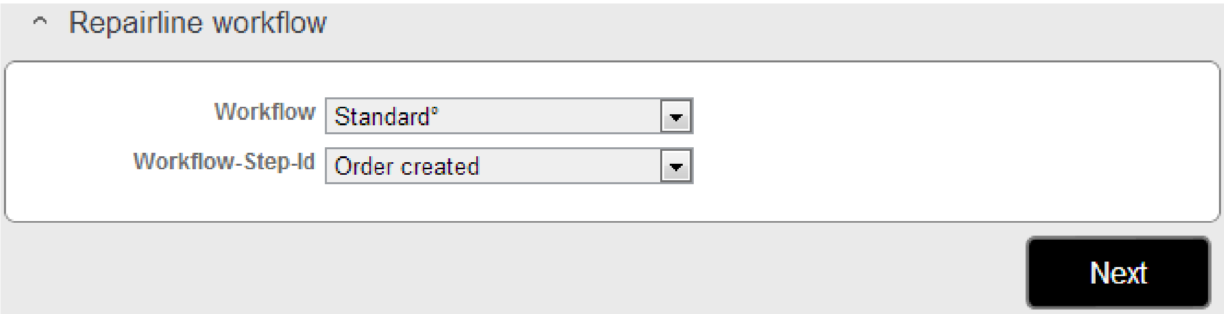


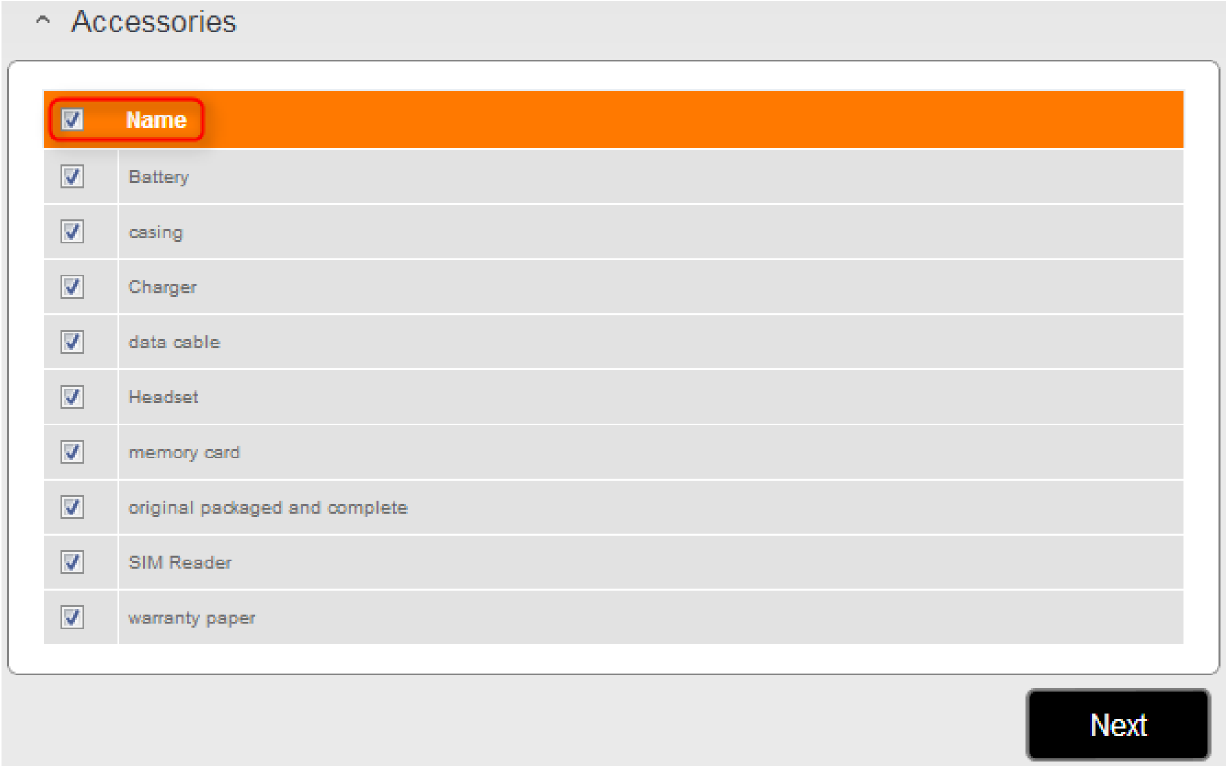

Now define the failure symptoms. By entering the symptom in the search line and the symptom are known the symptom and action will be set automatically. To add an additional symptom you have to click on the “Plus” icon next to Add. Symptoms. In order to achieve a more detailed error description, add a detailed symptom description / Comment in your own words to describe the symptoms.




Select Workflow and entry point and click on "Next".

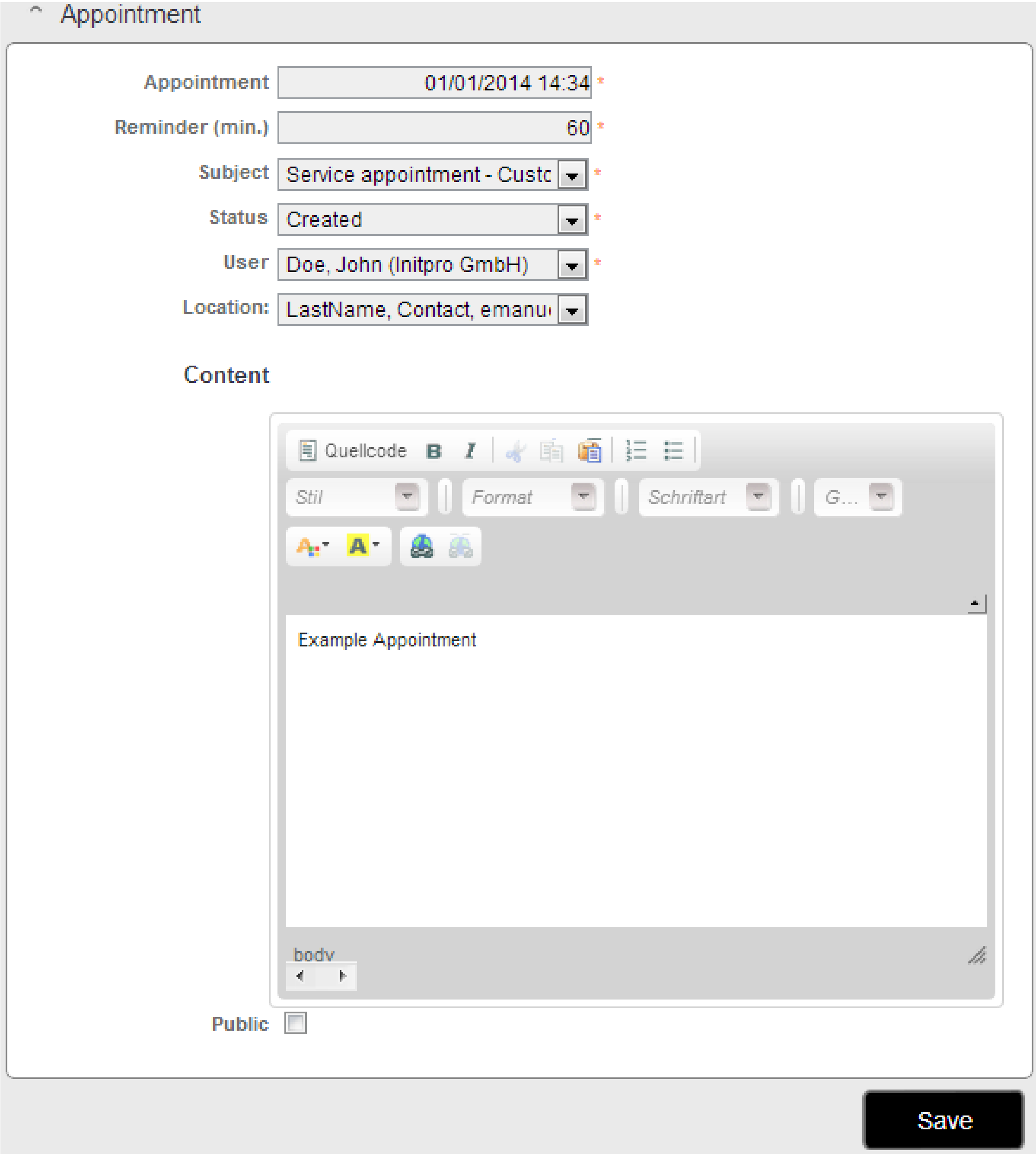



On the adoption of the device supplied accessories can be optionally registered. Set a checkmark to each accessories that is delivered. If every accessories are sent along put a checkmark next to Name and all accessories will be selected.




To forward a service case to colleague, select from the drop-down list "user" the desired colleagues.

To create a customer appointment, enter your appointment details.

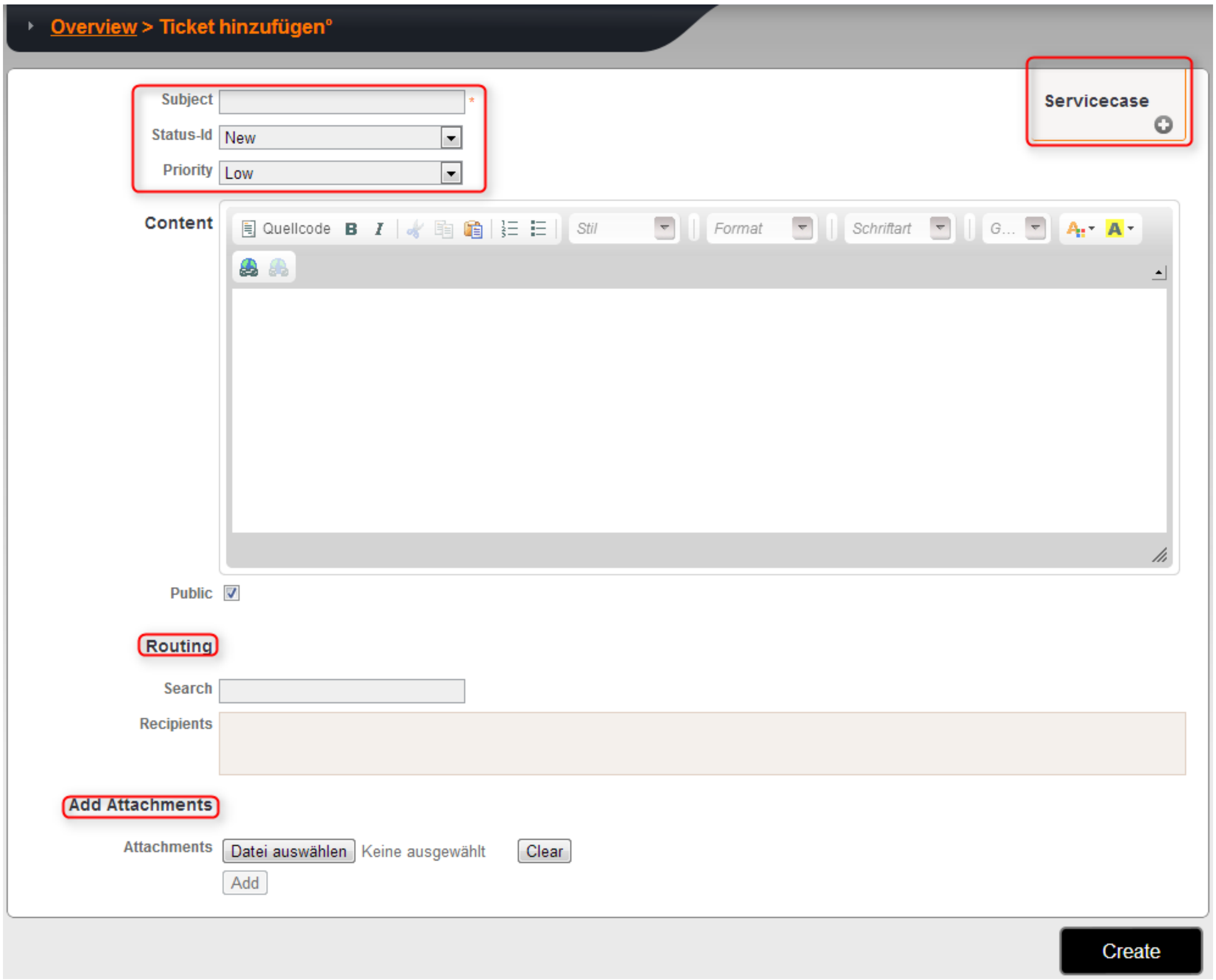



Click on "Create" to complete the servicing acquisition.

## 5. New Ticket

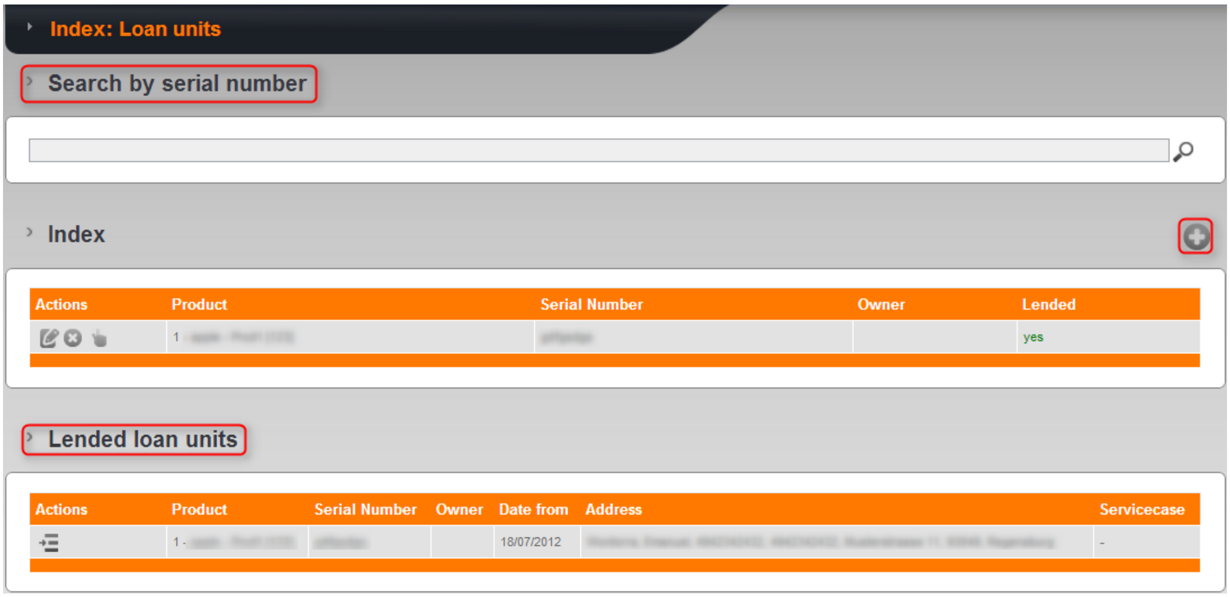
The ticket system manages your service requests. Each process is given a unique number so that the inquiries will be forwarded to the responsible contact person and can be processed as quickly as possible. To create a Ticket enter the subject, the status no. and select the priority. Enter your text in the text box and enter the names of your colleagues who will receive the ticket in the search line. It is possible to add the ticket attachments there for select a file and click on the “Add” icon. The Ticket can also be assigned to a Servicecase. For that you have to

click on the "Add" icon on the top right and select the Servicecase. To complete, click on "Create".




## 6. Loan Units

Here you see all your loan units. To add a loan unit click on the "Plus" icon. Enter the name and the Serial Number of the product and select the owner of the product. Click on the "Crate" icon to conclude or click on the "Crete + New" icon to save the loan unit and add another loan unit. The Index gives you an overview of all loan units and shows you if the product is lended or not. By clicking on the "Actions" icons you can edit, delete or look at the information's of the product. All lent products are listed under lended loan units if a lent product returns click on the "Return" icon to delete the product from the lended loan units list. To find a product quickly enter the serial number in the search line on top.




## 7. Search

Under "**Search**" you can use either the filter or the search line to search all of your Servicecases quickly and easily.

Search with search line: Here you can search for a specific term.

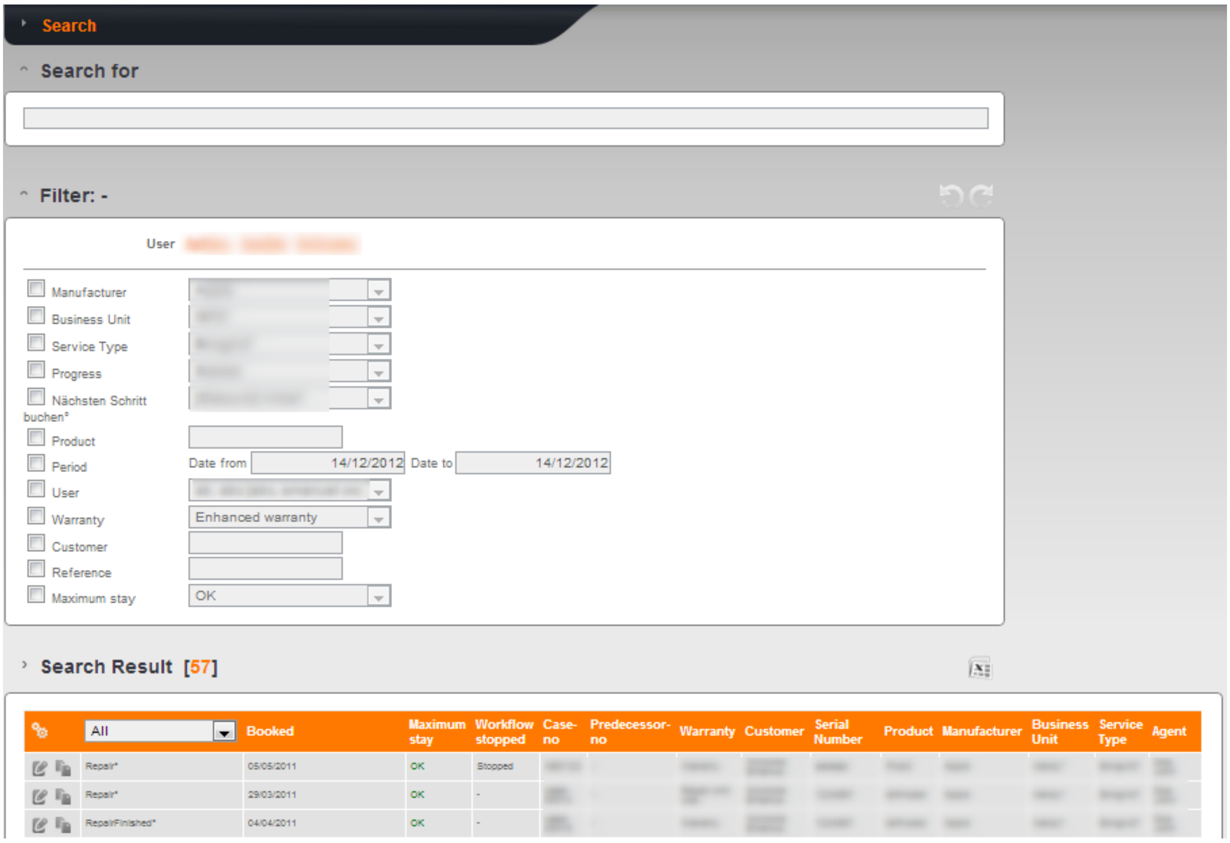
For example you want to see all Servicecases of one customer therefor enter the name of the customer into the search line and every Servicecase with of that customer will appear.

Search with the Filter: Set a checkmark to each component that should be included in the search.

For example you want to see all Servicecases of one customer from 2012 to 2013. Therefor set a checkmark next to Period and select the date 01/01/2012 to 01/01/2013 and set a checkmark next to name and enter the name of the customer. And all Servicecases will appear under Search Result.

When a particular filter setting is frequently used you have the possibility to save this filter setting by setting the filter as you like and clicking on the "Save" icon. Now this filter setting are shown again. Enter a name for that filter select if the filter is available company-wide and click on "Create".

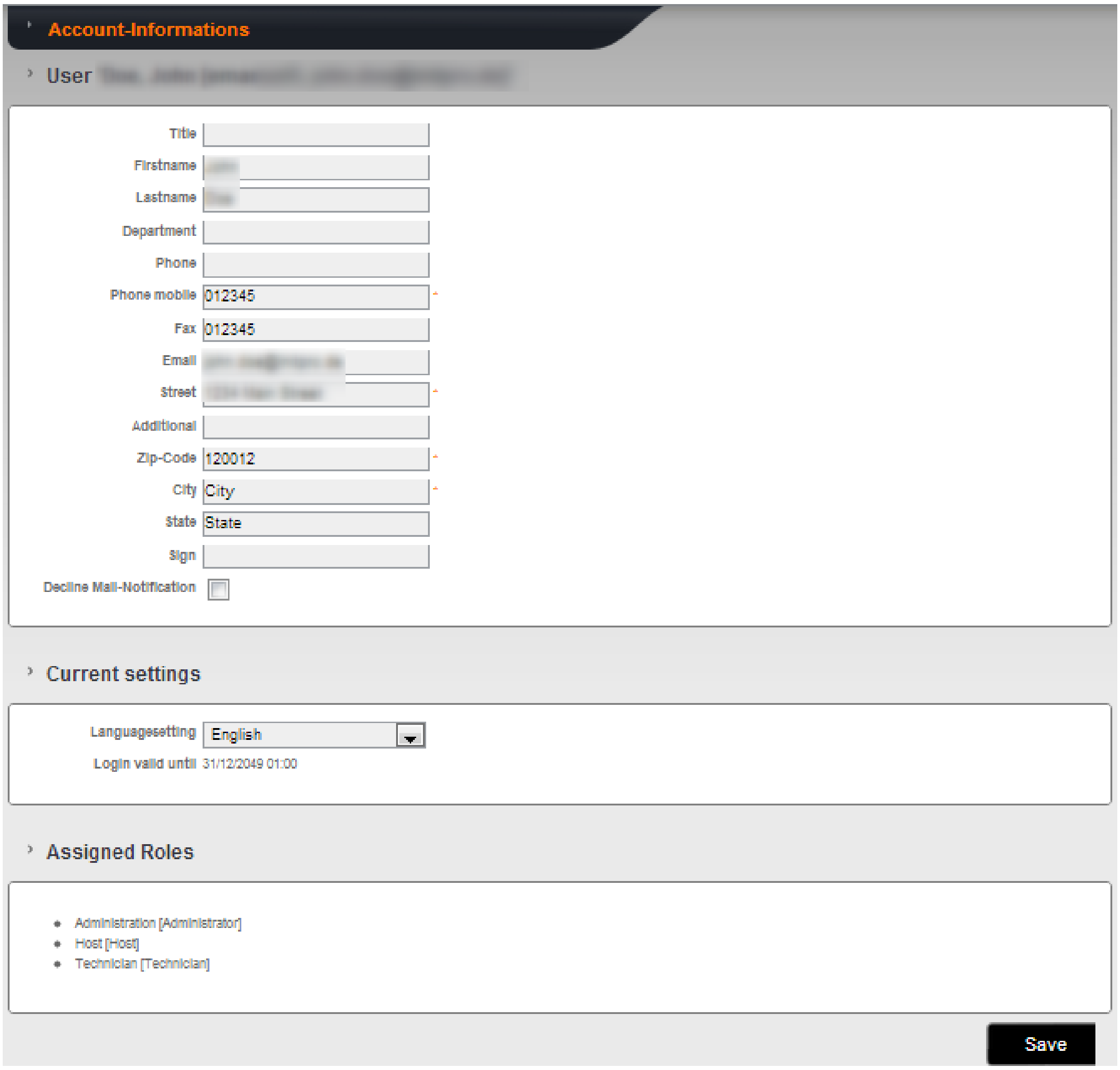
You can export your search result to an excel file. Click on the "Excel" icon and a filter will be shown. Put a checkmark to each component that should be shown as information in the excel file. Set the filter as you like and click on "Submit". To save the filter setting, enter a name for that filter, set the filter settings and click on the "Save" icon. To load a filter click on the dropdown list next to load filter. To delete a filter load the filter and then click on the "Delete" icon.




# 8. My Account

## 8.1 Account-Informations

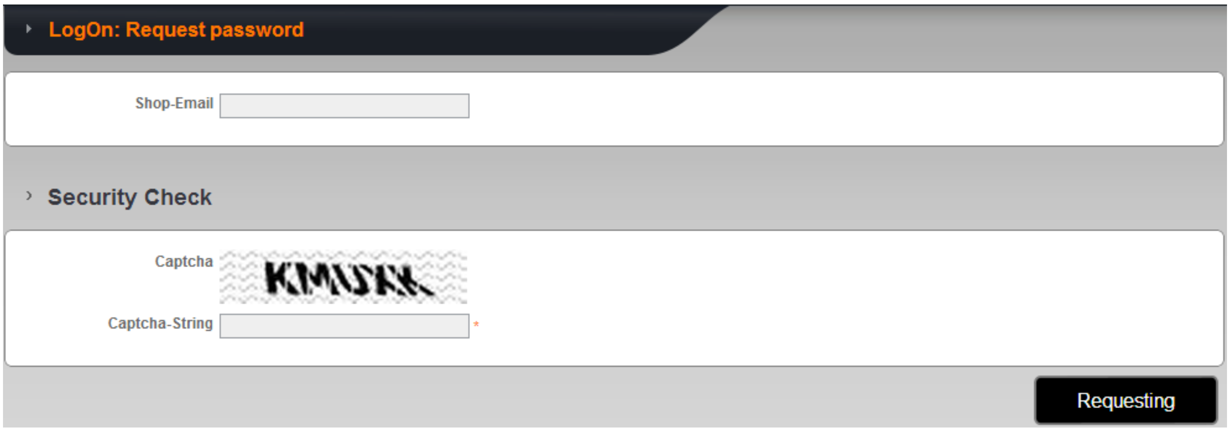
Under "**My Account - User Informatio**n" you can manage your own contact details and specify in which language you want to use Repair Line. It also appears your assigned role.




## 8.2 Change Password

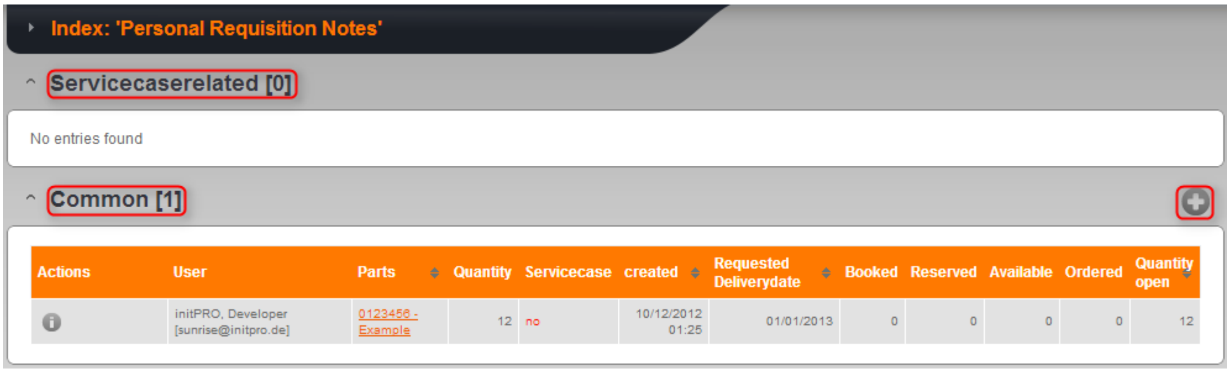
To change your password, click on "**My Account - Change Password**". Enter your current password and your new password. The password must be at least 6 characters. Confirm your new password by entering it again. For each password change a Captcha security feature is performed. Finally, click on "Change Password".

If you ever lose your password you have to click on the “Request Password” icon at the main page. Then they will need to enter your Shop-Email address and enter for the security check the given Captcha-String.



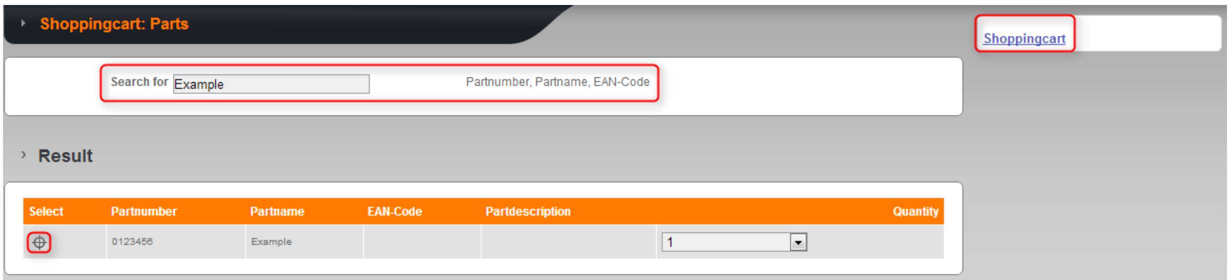

## 8.3 Personal Requisition Notes

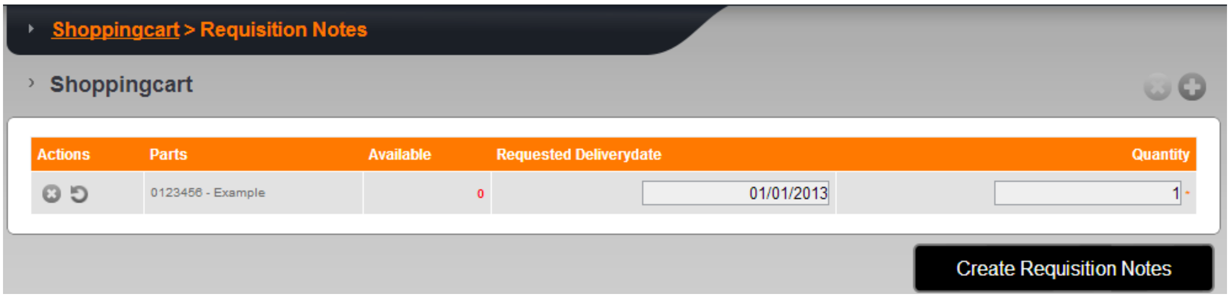
Here appear all of your common and servicecaserelated requisitions that you have created. By clicking the "Add" sign you can create new common requisitions.




## 8.4 Shoppingcart

Here you can create new requisition by using a shopping cart. Enter in the search field the part name (or part number, UPC code) and select the quantity and click on the "Select" icon. Now an information box will appears on the right top. To proceed, click on "Shoppingcart" select the requested delivery date and to complete click on "Create Requisition Notes".






## 8.5 Accounting details

Under "**Accounting details**" you set the address to which the billing details will be sent. Please choose the invoice type (printed or email) and the payment method (for example Direct Debit or Paypal). If you choose the Direct Debit pay method you have to enter your account data’s.

## 8.6 Monthly costs

Have a look at our well-structured price list:

Monthly costs consist of the number of registered users and the summed up monthly service cases. The following scale creates absolute transparency of costs:

Base Rate

| User | 1 - 10 | 11 - 50 | 51 - 100 | 101 - 500 | 501 - |
|---|---|---|---|---|---|
| Service Cases incl. | 10 | 40 | 80 | 165 | 500 |
| Price* per mounth | 10 € | 30 € | 60 € | 120 € | 350 € |

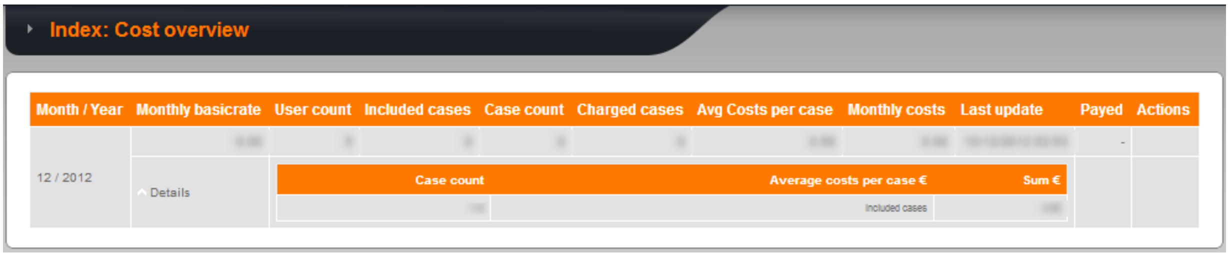
Costs per Registered Service Case

| Service Cases per mounth | 1** - 50 | 51** - 200 | 201** - 500 | 501** - 1000 | 1001** - 10000 | 10001** - 50000 | 50001** - |
|---|---|---|---|---|---|---|---|
| Price* per Service Case | 0,70 € | 0,65 € | 0,60 € | 0,55 € | 0,50 € | 0,40 € | 0,30 € |

* all prices are quoted before value added tax.

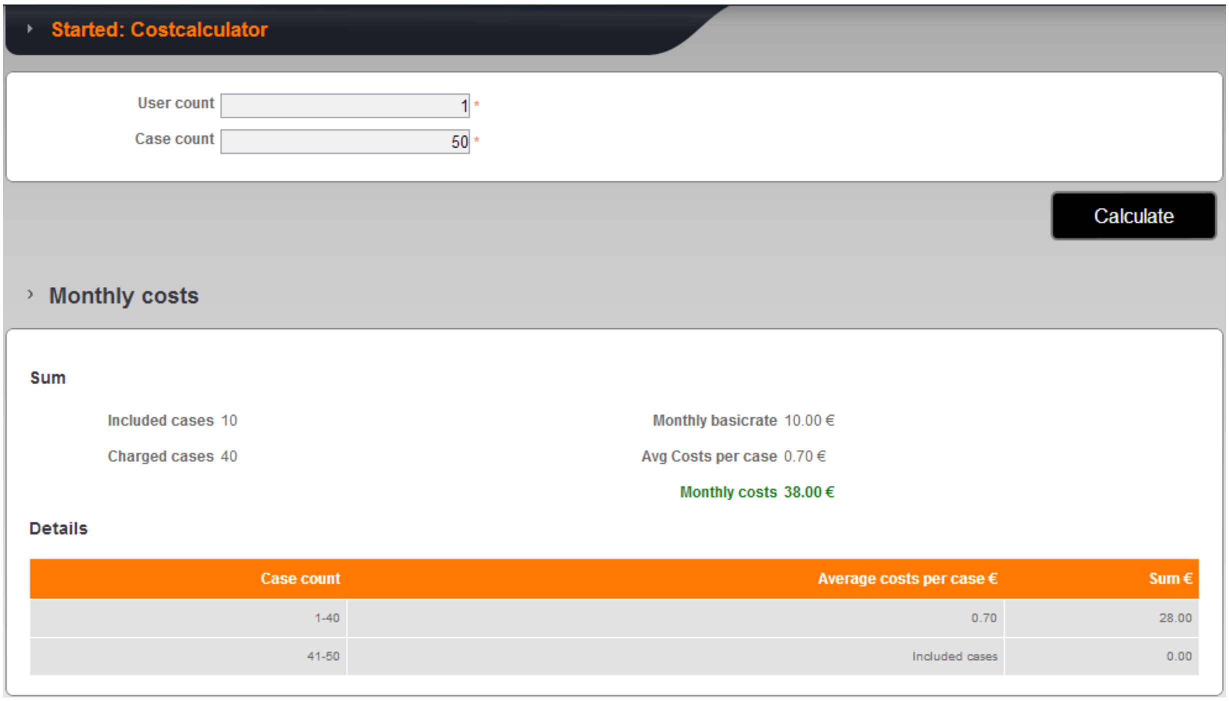
** as from the 1st service case; as from the 51st service case; as from the 201st service etc.

"**My Account - Monthly costs**" here you can see the costs overview of your company. Use the filters to choose over which period you want to see the cost overview.



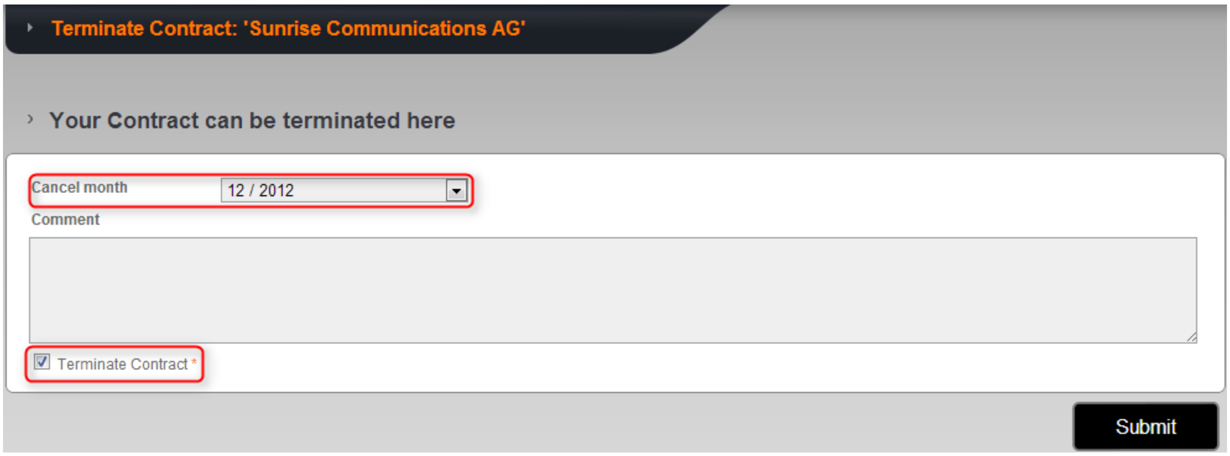

## 8.7 Costcalculator

By using the Costcalculator you can calculate the monthly cost of your company. By entering the number of users and the number of Servicecases the Cost Calculator creates you the monthly costs that would be incurred. To calculate the monthly costs you have to enter the user count and the case count.




## 8.7 Terminate Contract

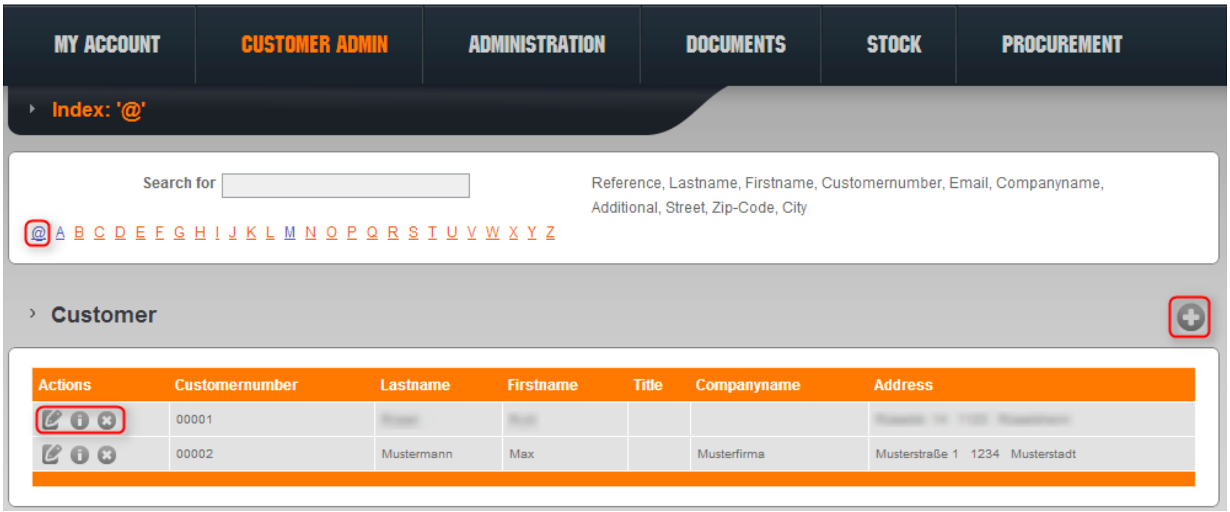
To terminate your contract, click on "**My Account - Terminate Contract**". Now select the termination month and put a check mark to "Terminate Contract" (In the text field "Comment" you can make comments to your termination / for example the reason for the termination). To complete the termination, click on "Submit".



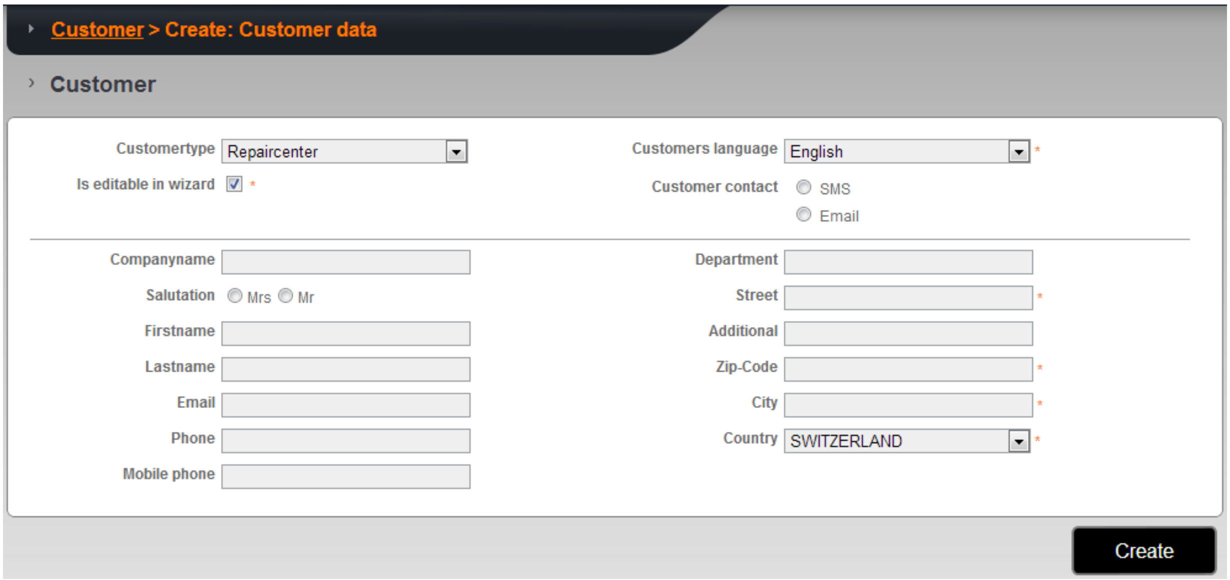

## 9. Customer Admin

Customer may be created when recording a new Servicecase. Already registered customers can be searched under "**Customer Admin**". The search is performed by typing the first or last name (search also accepts Customernumber, Email, Companyname, Additional, Street, Zip-Code, City, Reference) or by using the alphabetical index. The search is done by clicking on the letter that corresponds to the first letter of the last name / company name. By clicking on the @letter all registered customers will be listed.

The "Actions" column shows 3 icons (edit, detail, delete). By clicking on the "Edit" icon the data's of the costumer can be changed. Under "Detail" the costumer information's and the last ten Servicecases will appear. By clicking on the "Delete" icon the costumer will be delete.



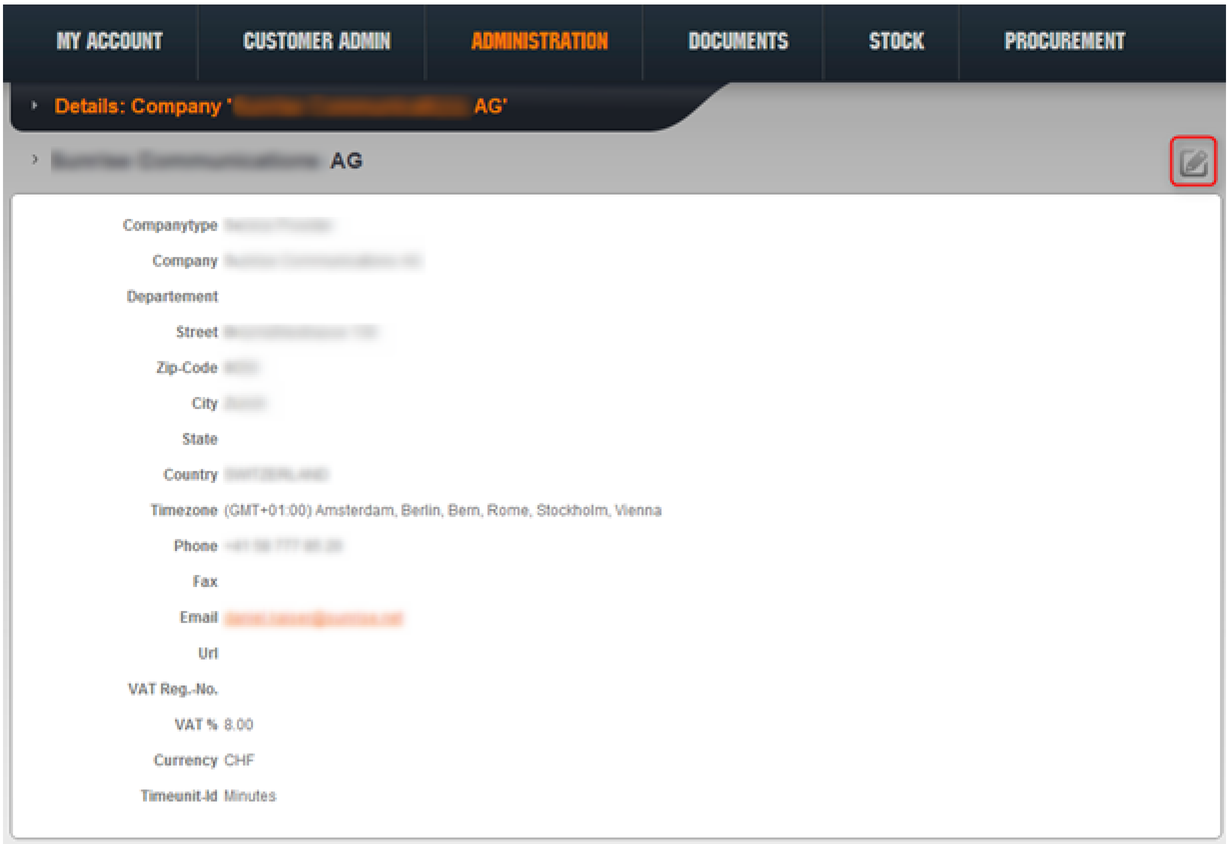

To create a new costumer you have to click on the "Add" icon. After clicking on the "Add" icon a formula will appear. Now select the customertype, the customer's language and the way the customer is contacted. Enter the information's of the costumer and click on create.




# 10. Administration

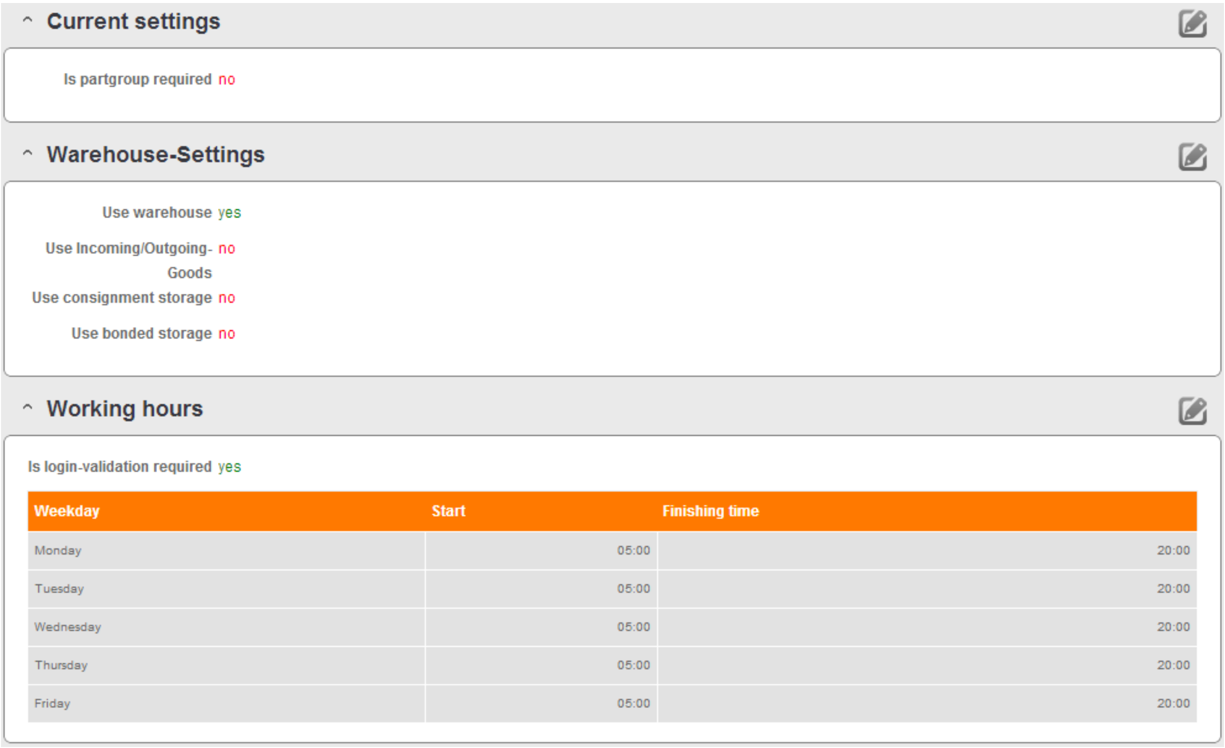
## 10.1 Company

"**Administration - Company**" here you find your Company's master data set. You can see the details of your company (such as address, telephone number, time zone, currency, VAT rate,%, etc.) which can be changed any time by clicking on the "Edit" icon.



Here you will also find an overview of User. The "Actions" column shows 3 icons (edit, detail, delete). By clicking on the “Edit” icon the data’s of the user can be changed. Under “Detail” you will see the details to that user and you will see the Assigned Roles. By clicking on the “Delete” icon the user will be delete.

Here you also set Current-Settings, Warehouse-Settings and Working hours of your company. By clicking on the “Edit” icon these settings can be changed.




Edit the languages that your company accepts by setting a checkmark next to the language and decide which language is the default language.

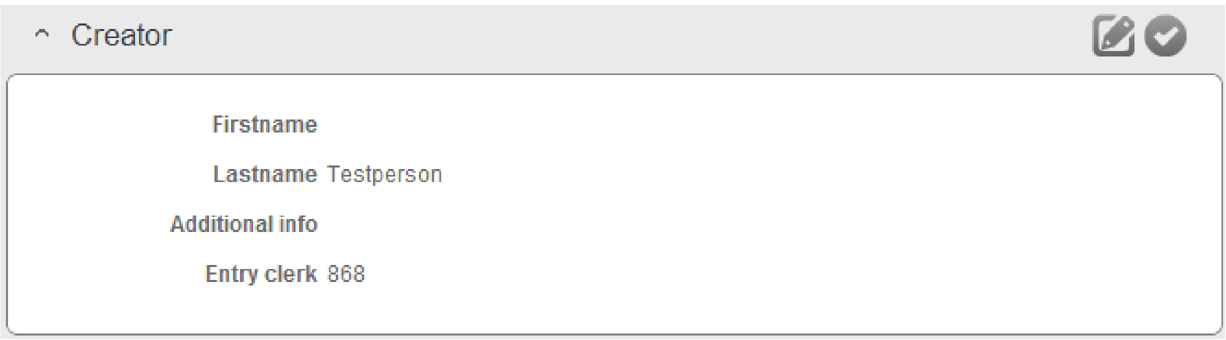
## 10.2 User

To add a user, click the "Add" icon and enter the necessary user information. With each new registration a security check is performed and entering the Captcha string is required. To complete the registration click on “Register”.

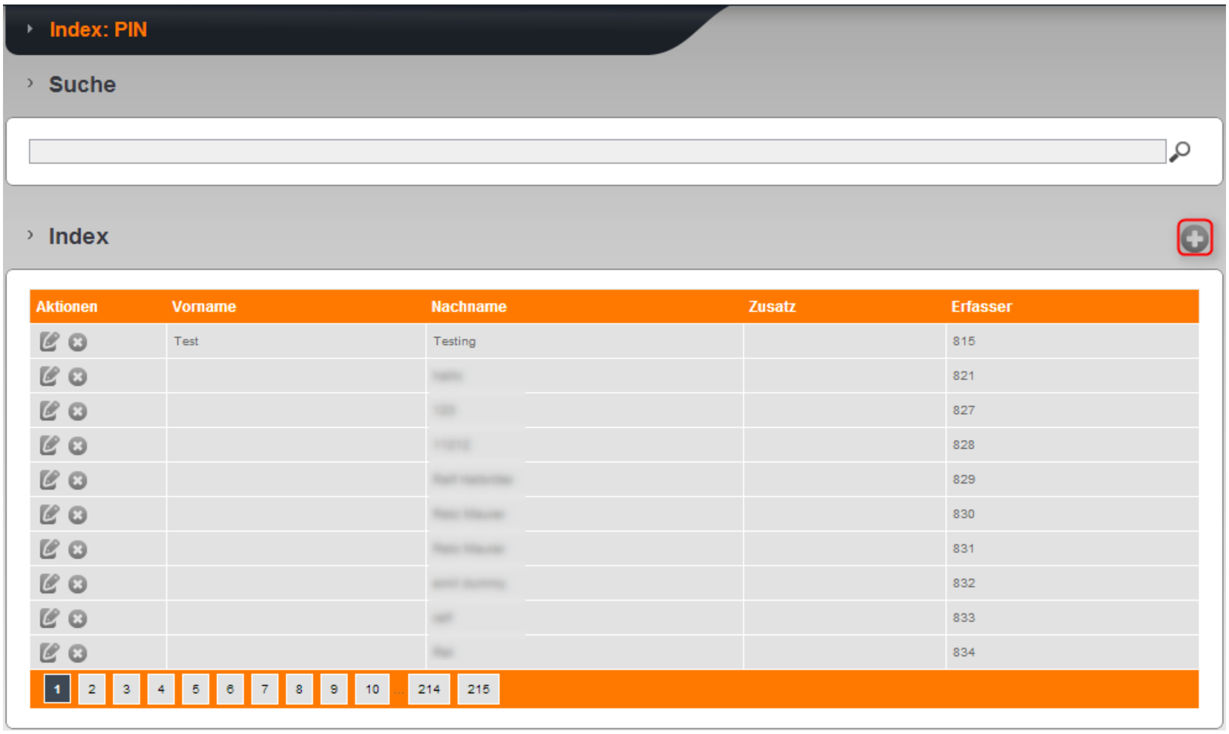

Existing users can be searched under "**Administration - Users**". The search is performed by typing the first or last name, or by using the alphabetical index. The search is done by clicking on the letter corresponding to the first letter of the surname. By clicking on the @ letter all registered users will be listed.

## 10.3 PIN

PIN is used to set the creator. It is needed when a Servicecase is captured or passed to a colleague.

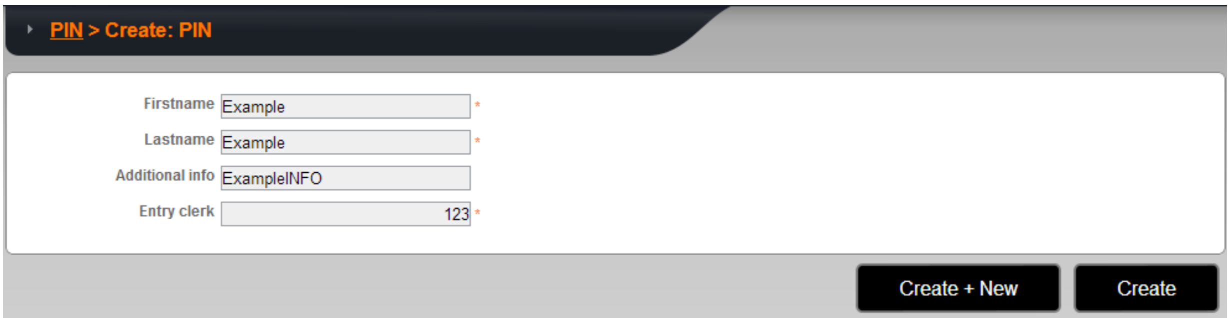



Already registered PIN´s can be searched under "**Administration - PIN**". The search is performed by typing in the first or last name into the search line. To edit or delete a PIN click on the icons in the action column.



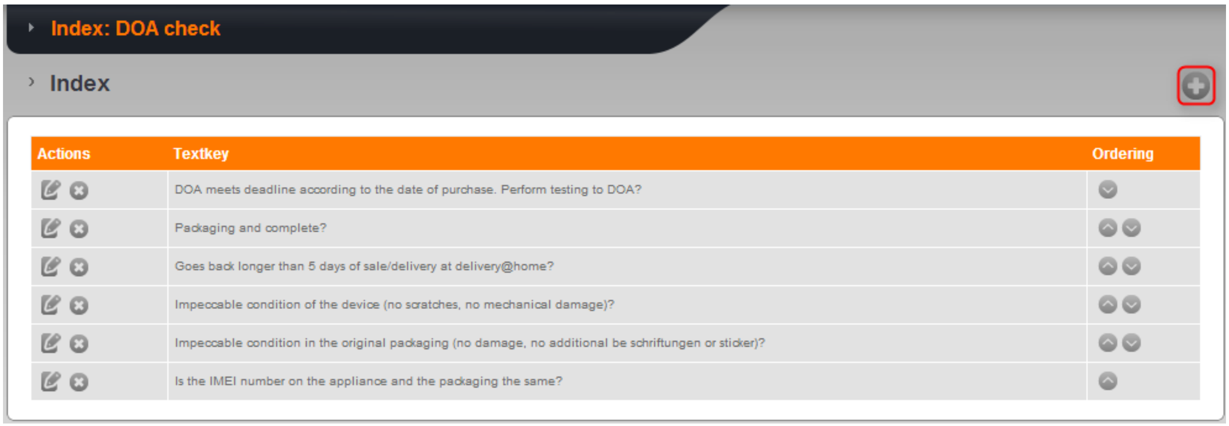

To create a new PIN you have to click on the "Add" icon the top right. Now enter First- and Lastname and the Entry clerk. You have the opinion to add Additional Informations.

To complete, click on "Create" or click on "Create + New" to create that PIN and stay on this page to create another one.

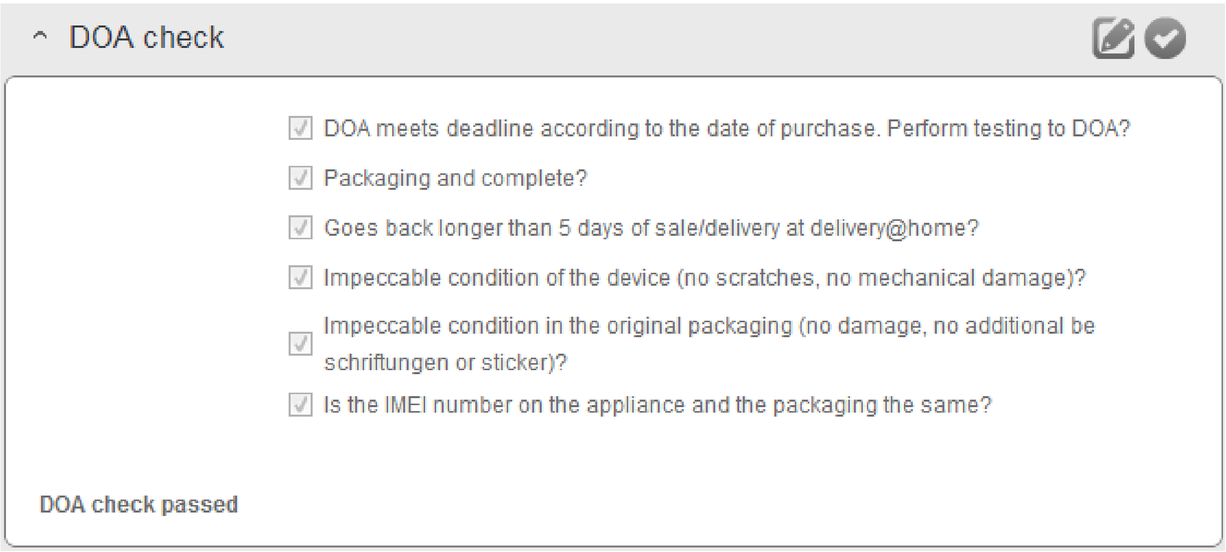


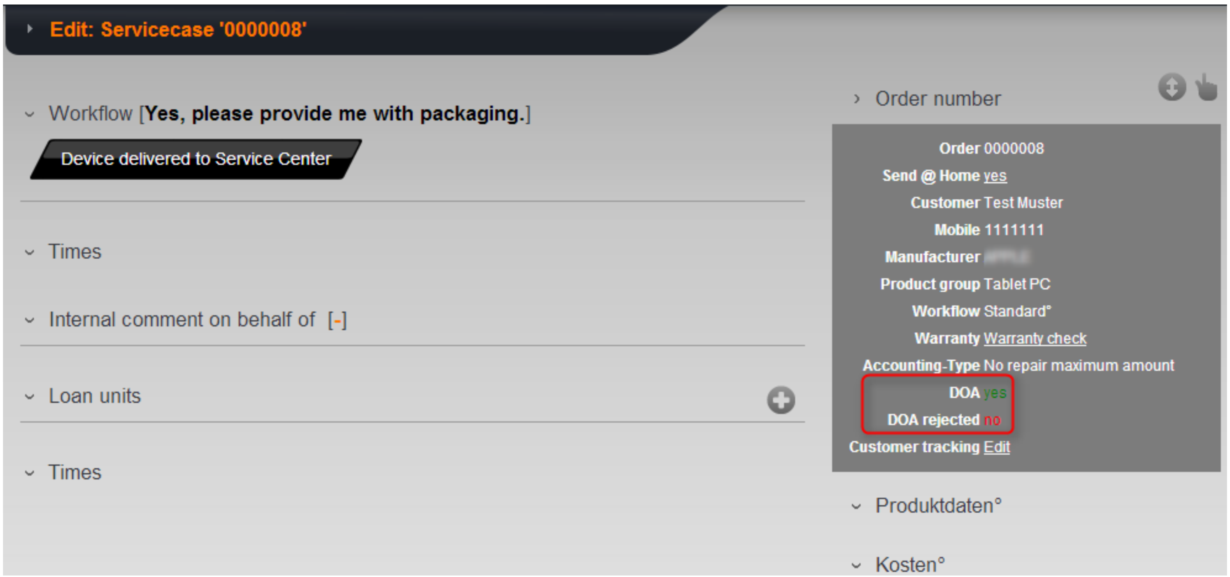

## 10.4 DOA check

Create under "**Administration – DOA check**" your individual Dead On Arrival-checks. The DOA-check is a check that is performed when a customer receives a product which does not work. The DOA-check is performed while a new Servicecase is created. If the product passes the DOA-Check the Servicecase will get a "DOA-check passed" status. Click on the "Add" icon to create a textkeys. After that they will be shown in the DOA-Check-Index. Set the ordering of the textkeys by clicking on the "Up" and "Down" icons. To edit or delete a textkey form the DOA-Check click on the icons in the action column.



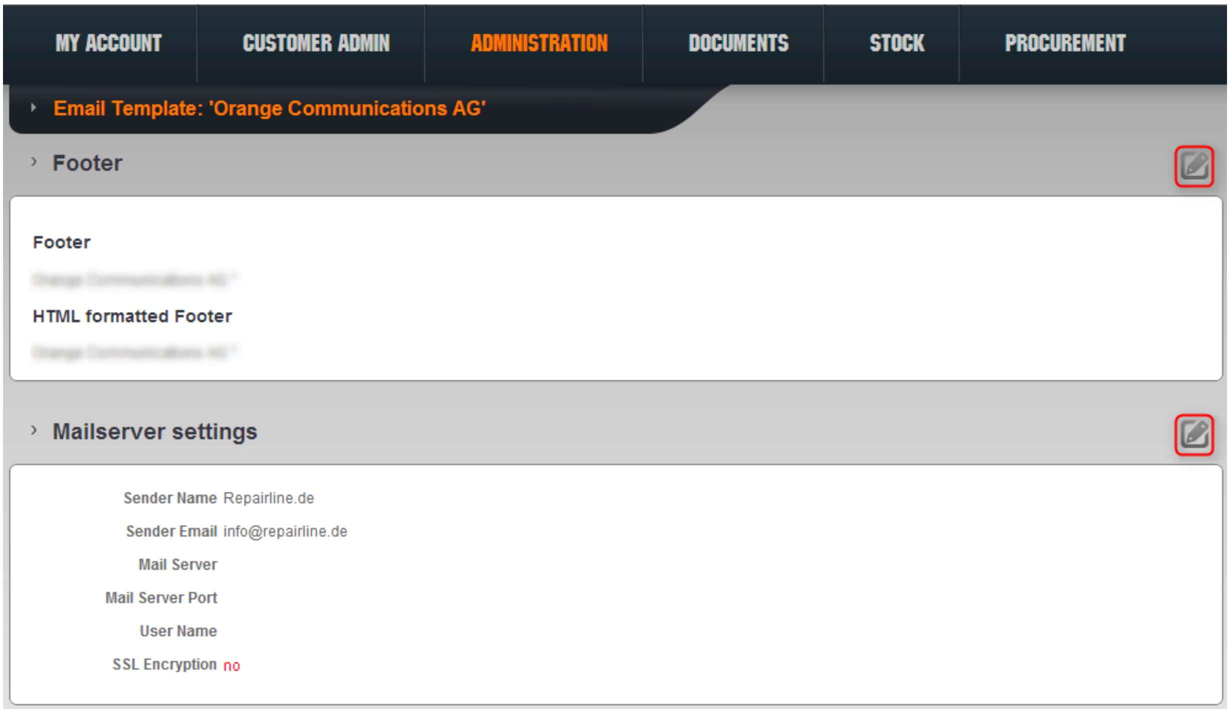

If the first statement of the DOA-check is true set a checkmark. The next DOA-check statement will appear. When all statements of the DOA-check are correct “DOA check passed” will appear.



## 10.5 Email Template

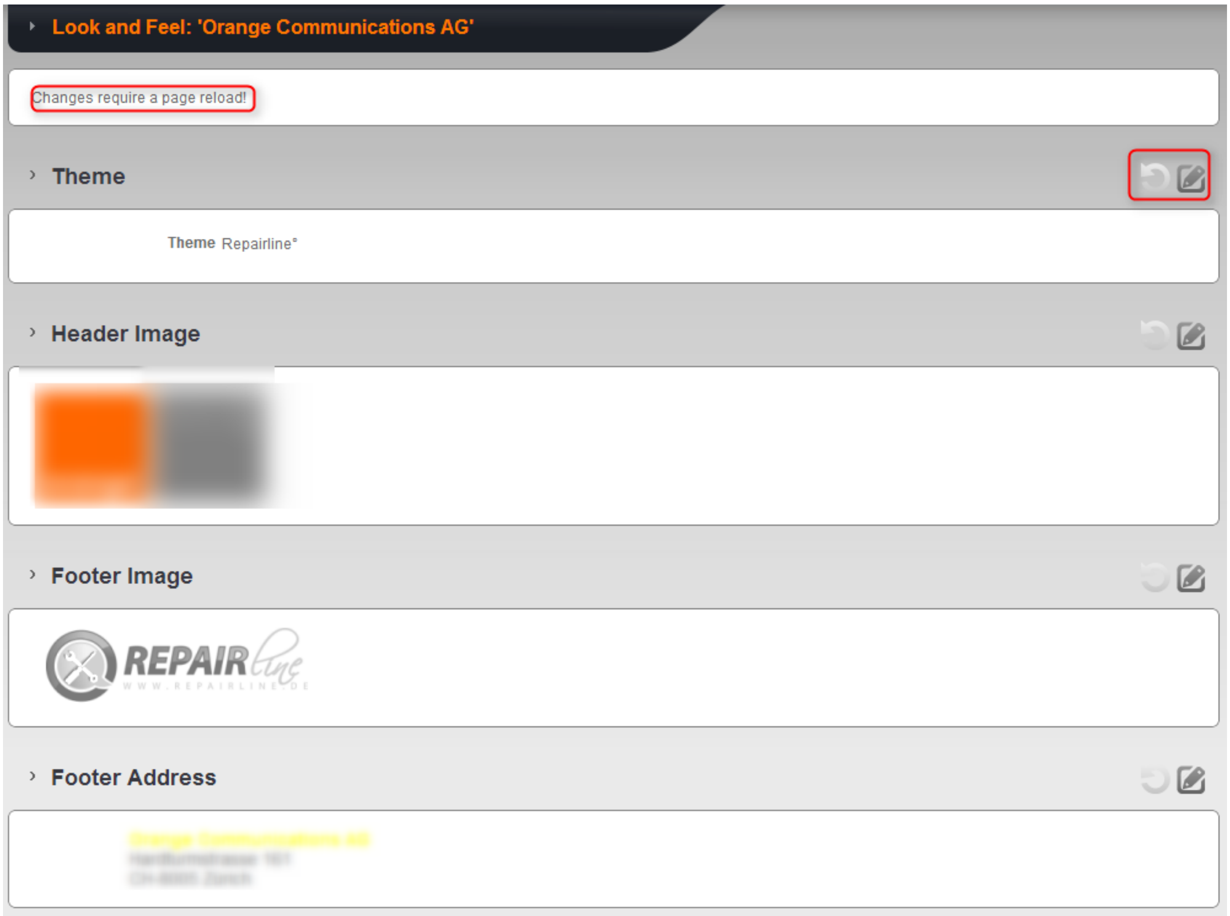
Email - Templates allow the user to save time and easy to send emails. "Administration - email templates" may footer and general settings, such as the sender's name, sender email, mail servers, etc., the personal ideas can be adapted. To change the Footer or the Mailserver settings click on the “Edit” icon.




Please enter in your settings if you want use your own mail server, otherwise the default Repairline Mail Server setup is valid.

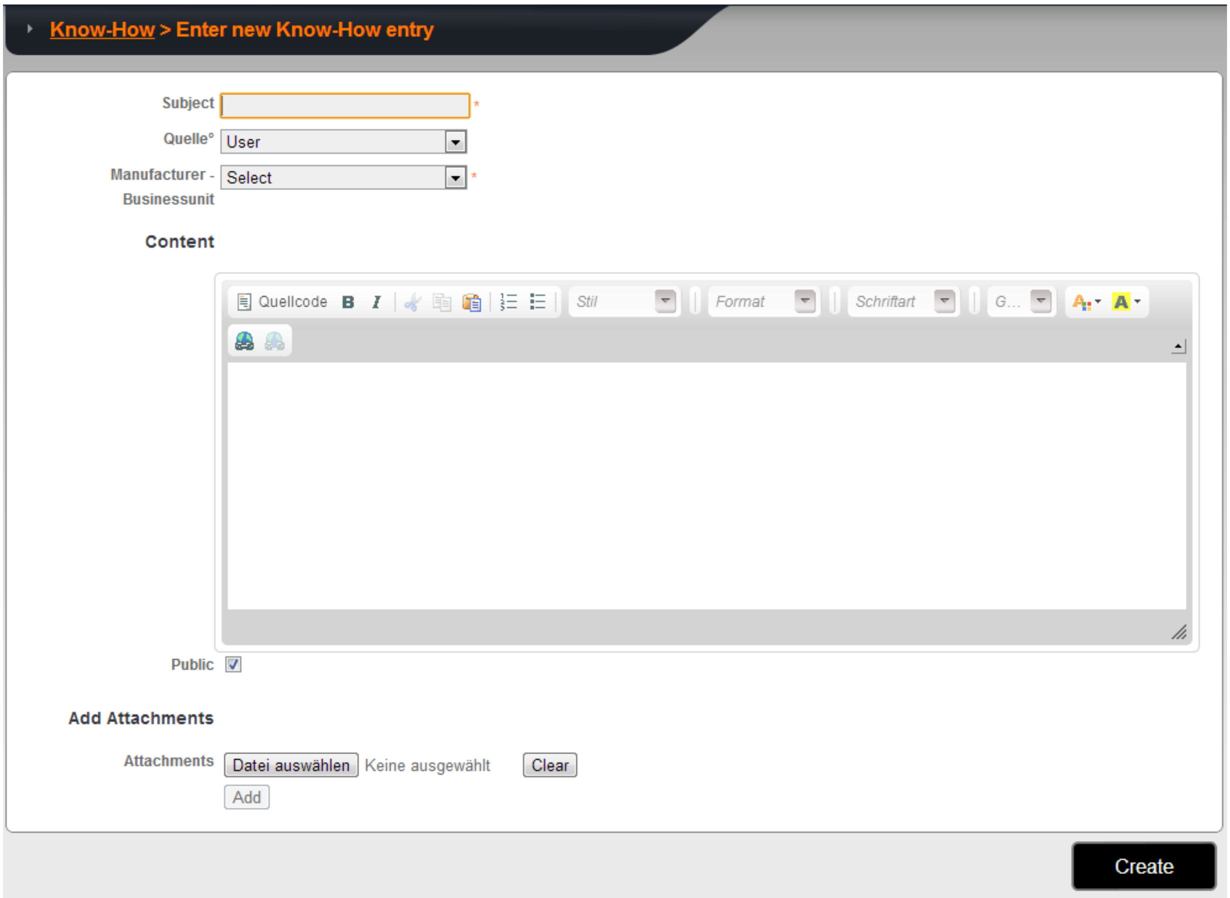
## 10.6 Look and Feel

"**Administration – Look and Feel**" here you can make individual adjustments to the website design. Color scheme, the image of the header and the footer are ready to complete as desired. To change the Look click on the “Edit” icon next to Theme, Header Image, Footer Image, Footer Address, Footer Contact or Contact email on login page. To reset the changes click on the “Reset” icon. All changes require a page reload!




## 10.7 Know-How

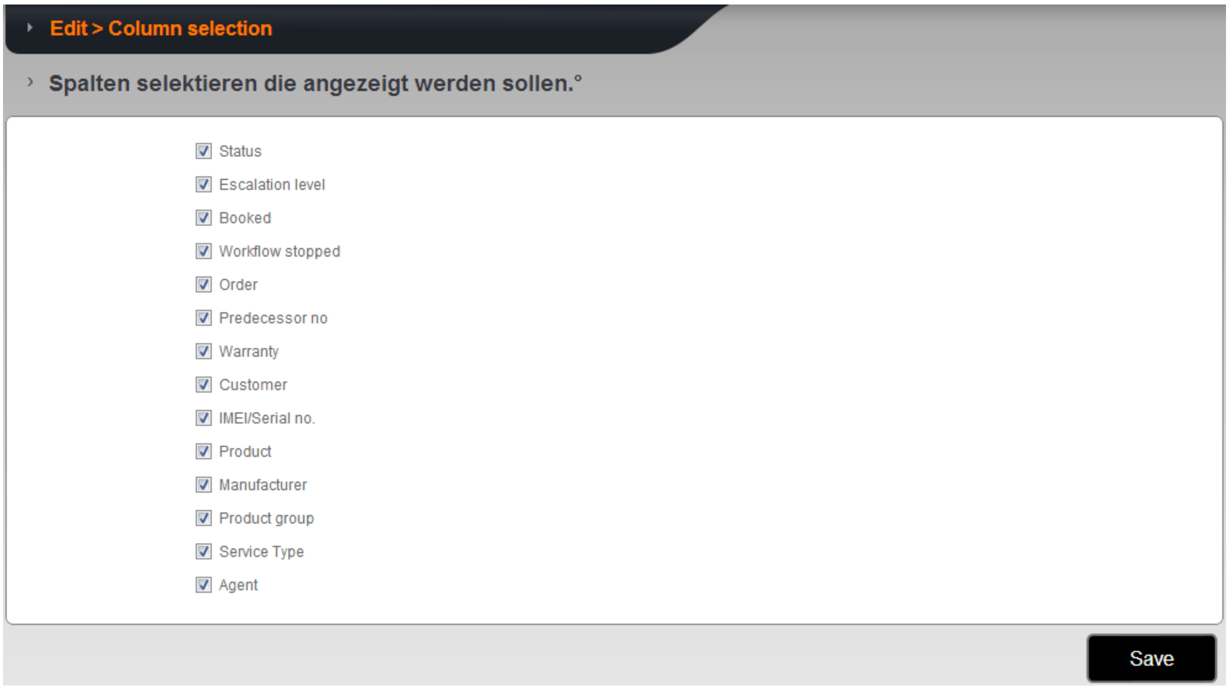
Here under “**Administration – Know-How**” users, manufacturers and companies can share their know-how (general information or product-related information) and thereby optimize the quality of service. To create a general Know-How Message you have to click on the “Add” icon next to general informations. To create a product-related Know-How Message you have to click on the “Add” icon next to product-related informations.




## 10.8 Column selection

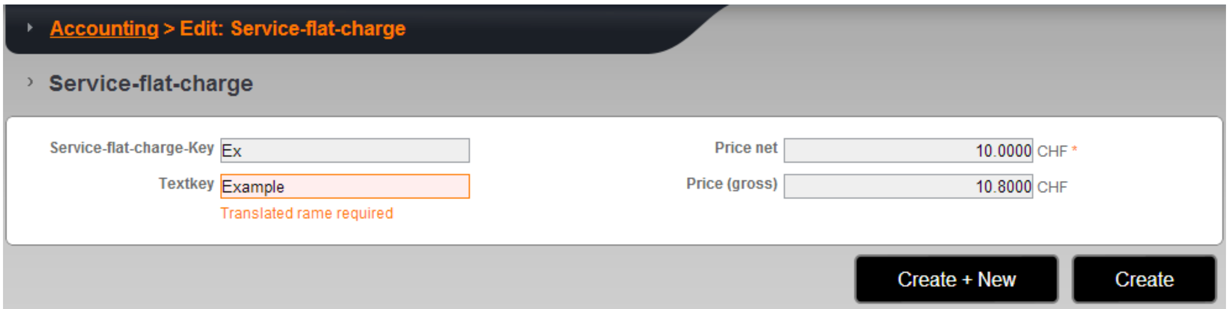
Under "**Administration – Column selection**" you can select which columns you want to be displayed.

Each column shows different information's. Set a checkmark to each column you want to be displayed. To deselect a column, click on the set checkmark and the checkmark will be unselect.



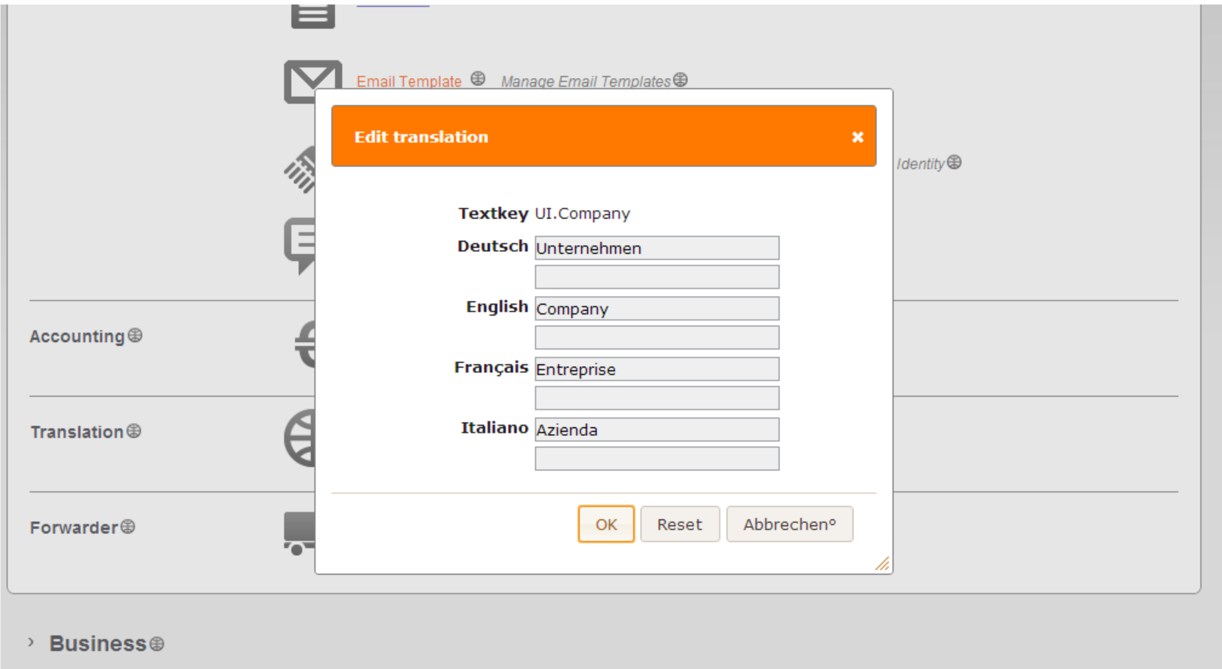

## 10.9 Accounting

"**Administration - Accounting**" here you have the possibility to create Service-flat-charges and Wage groups of your users. To create a Service-flat-charge or a Wage group, click on the little "Add" icon next to each title. Now you only have to enter your text keys and the corresponding net price. When you type in the net price or the gross price the other one will be set automatically. (To edit the value added tax for your company click on **10.1 "Administration Company"**) To complete, click on "Create" or click on "Create + New" to create that Service-flat-charge/Wagegroup and stay on this page to create another one.


## 10.10 Translation Mode

To turn the translation mode on or off, click on "**Administration - Translation Mode**". Is the translation mode is on, after each key text appears this icon: By clicking this icon opens a window for editing the text key. Now you can edit the translation of the text key in the languages that you have chosen for your company.




## 10.11 Forwarder

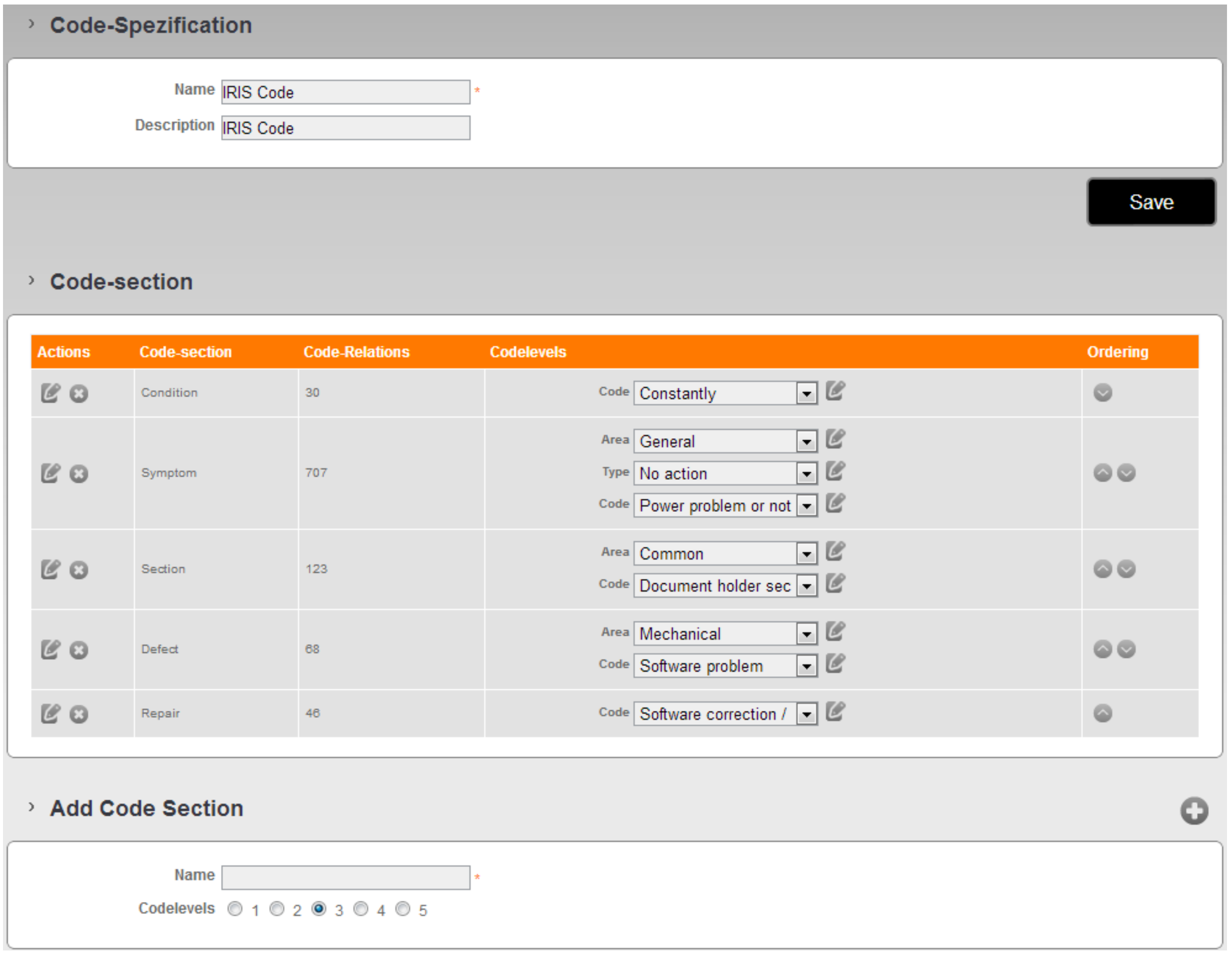
To be able to send packets to orders to shipping company (UPS, DHL) will be taught .Click here to update your master data record for carrier / parcel service. To create a new carrier you have to click on the "Add" icon the top right. Now enter the data for your carrier to (Forwarder name and Forwarder type are required) and to complete click on "Create" or click on "Create + New" to add another carrier.


## 10.12 Service-Code

To create a service code, click on "**Administration – Service-Code**". Service-Codes serve as structured documentation and documentation of failure -symptoms -states and made repairs. You can use either one of the 4 System-Templates and change them the way you want or you can even create your one Service-Code! This allows you a manufacturer-independent service execution.

System-Template can be used. (Such as the IRIS code, a specified, an international standard for structured identification and documentation of fault symptoms, states and performed repairs)

To copy a System-Template, click on the “Copy” icon in the actions column. Now the Service-Code will be shown in the Settings-List. To edit the copied Service-Code, click on the “Edit” icon.



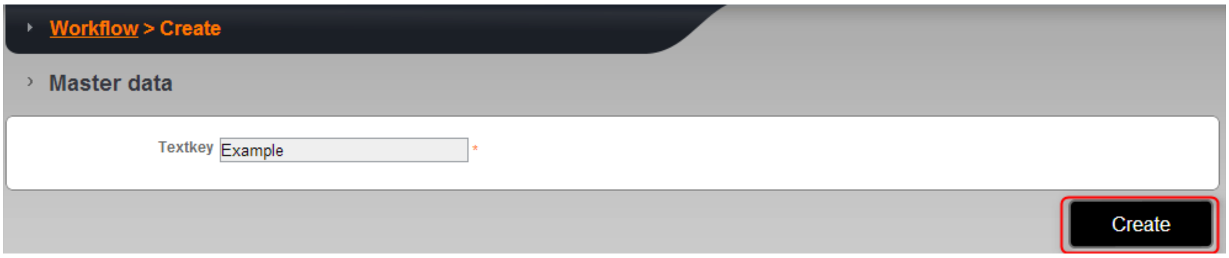

To create your own Service-Code, click on the “Add” icon next to Settings. First you need to specify your code by entering a text code and a description of your code. Now the service code is created. Enter the name of the section and select the number of code levels. Click the "Add" icon next to Add Code Section to add the code section. Any number of code sections and code levels can be created. To order the Code-Sections use the “Up” and “Down” icons in the Ordering column.

## 10.13 Workflow

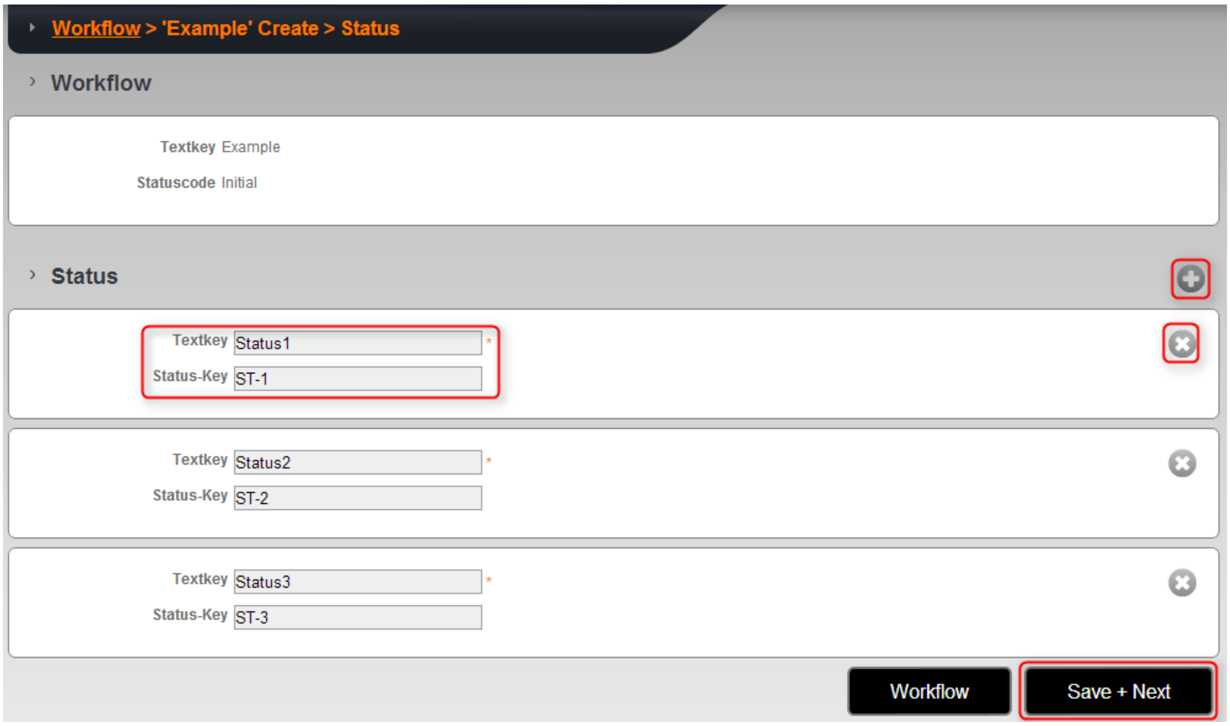
Workflow is the actual repair process. This is running the same or similar for repairs. You can also use either one of the System-Templates and change them the way you want or create your own Workflow.

A workflow is divided into several steps. Workflows can contain loops. Each workflow must have a defined start and end state.

To define a workflow, click on the "Add" icon next to settings. Enter the Textkey (name) of the workflow and click on “Crate”.

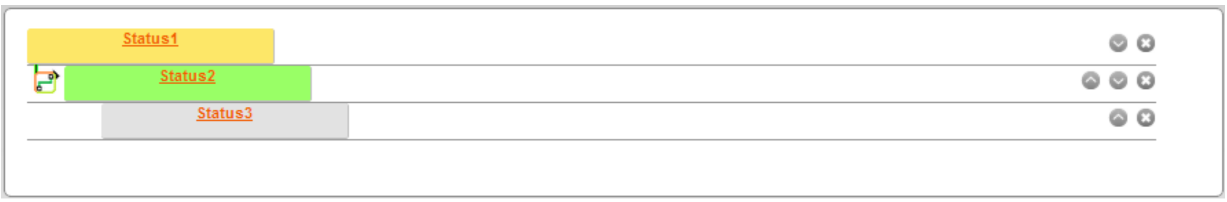


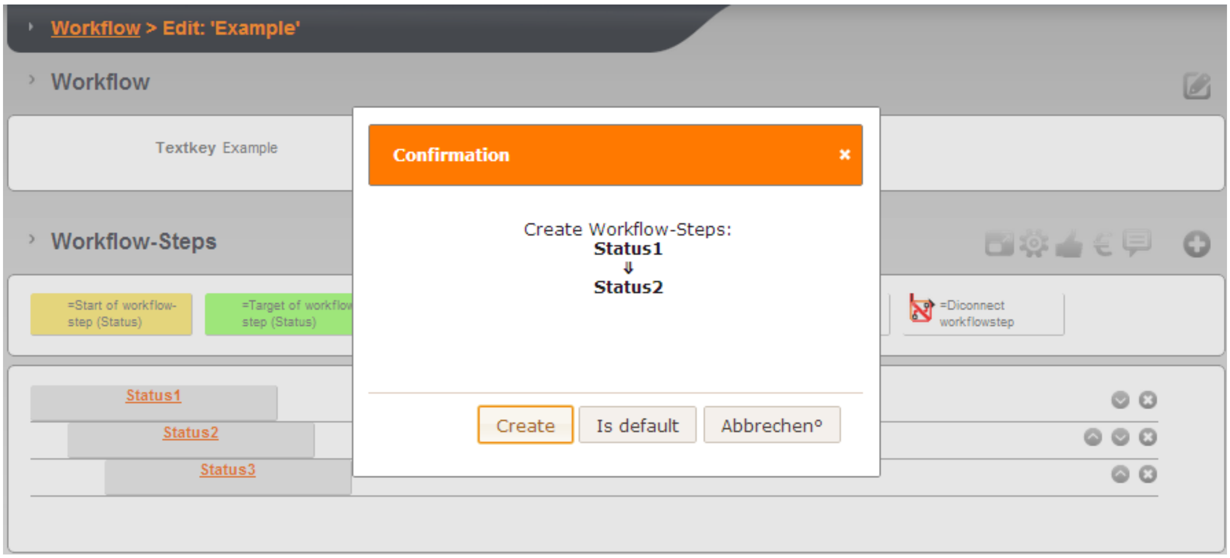

After clicking on “Create” you automatically will be forwarded to the next step. Now you have to define the states of your Workflow. The current status corresponds to a state in the Workflow that can be achieved during the repair process. Enter a Textkey for the status and enter a Status-Key. For example, you can use a shortcut of the Textkey for the Status-Key. To add more status, click on the “Add” icon.




Now you have to edit your Workflow-Steps. Please note the instructions.


To create a Workflowstep click there, where the line and column of the two statuses are crossing. The status which is the start of the Workflowstep will get a yellow background and the target status will get a green background. Now you have to confirm the Workflowstep click on “Create” to create the Workflowstep, click on “Is default” to set this Workflowstep as the default step or click on “Cancel” (Default Workflowsteps will be shown blue).

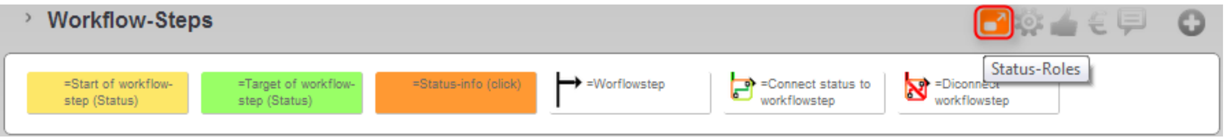




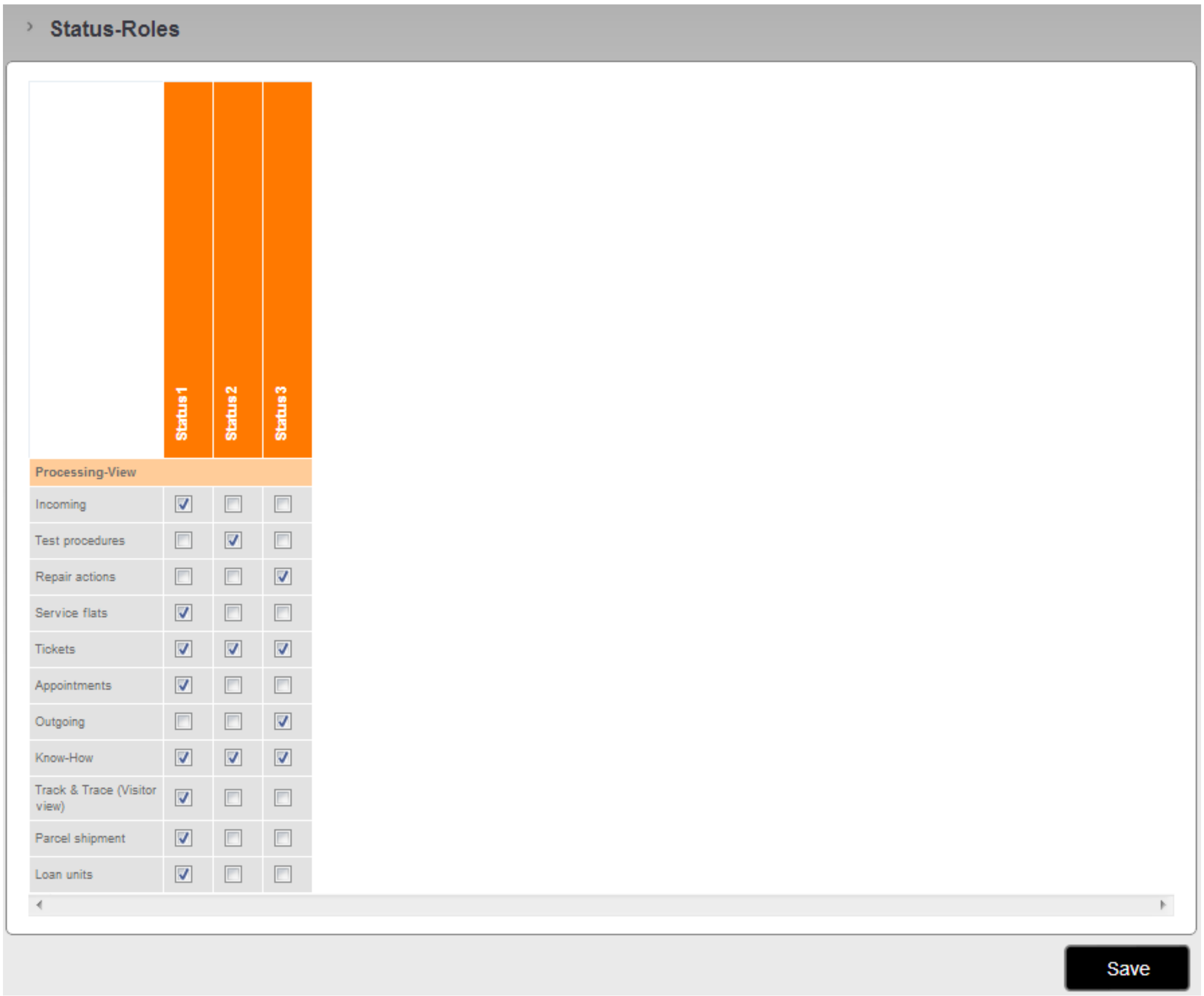

To disconnect two statuses, click on the Workflowstep and confirm by clicking on "Delete".

Start- and Endpoints will be set automatically.

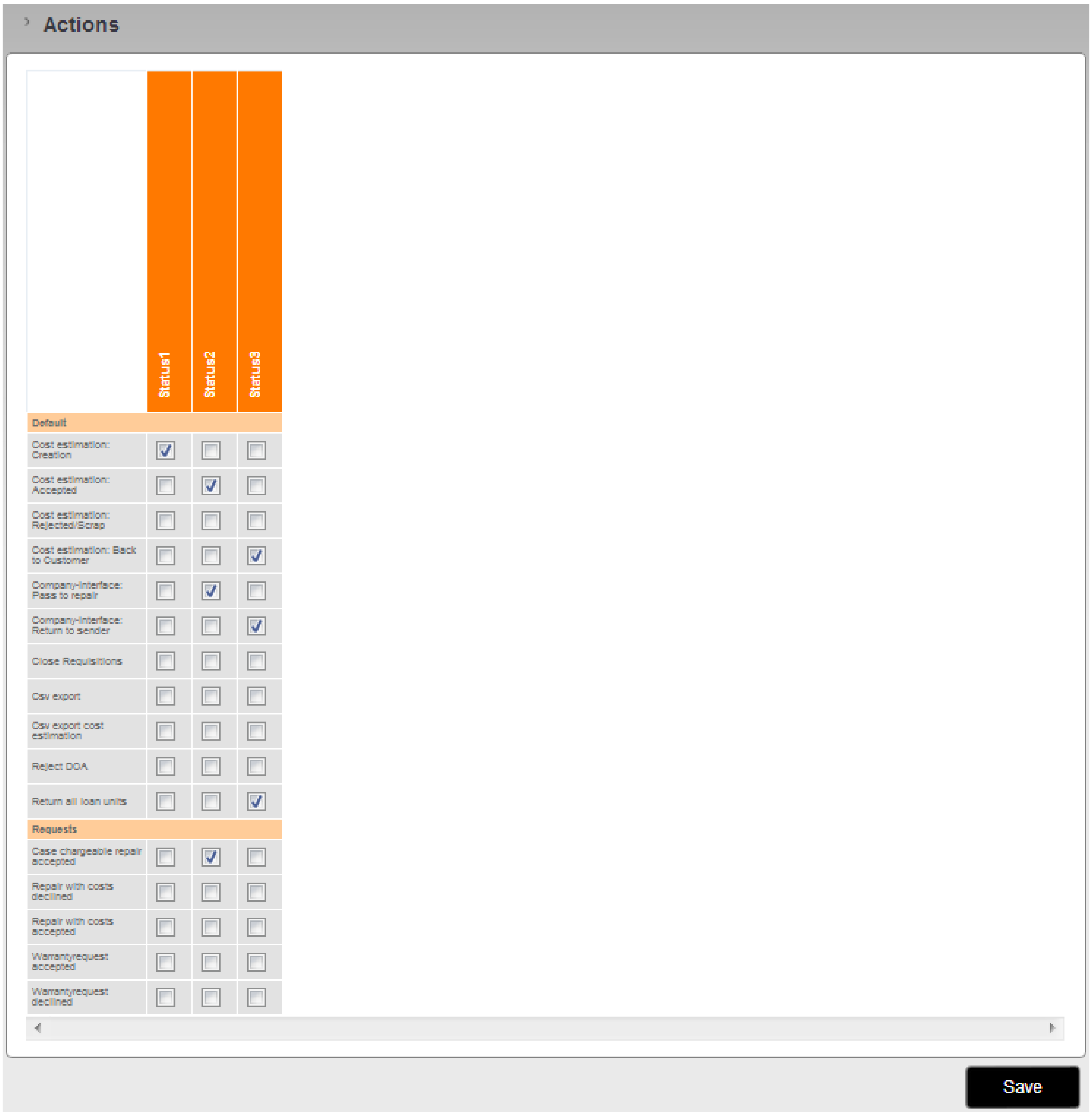

To each state you can add so-called status-roles. These determine what information and input options are available in this status. To confirm the status-roles, click on the "status-roles" icon.



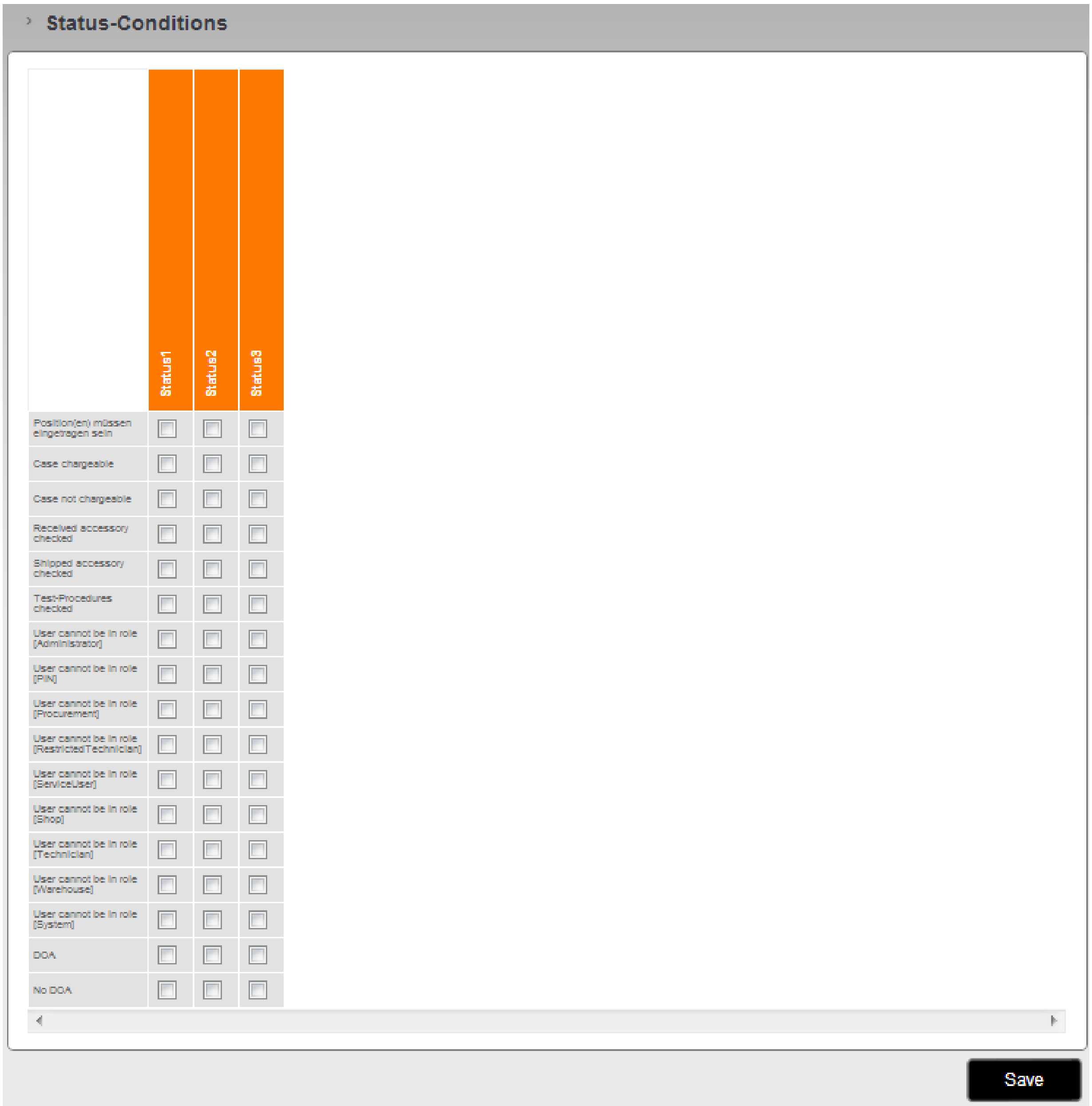

Now set a checkmark where the column of the status and the line of the status-role are crossing. To confirm click on "Save".



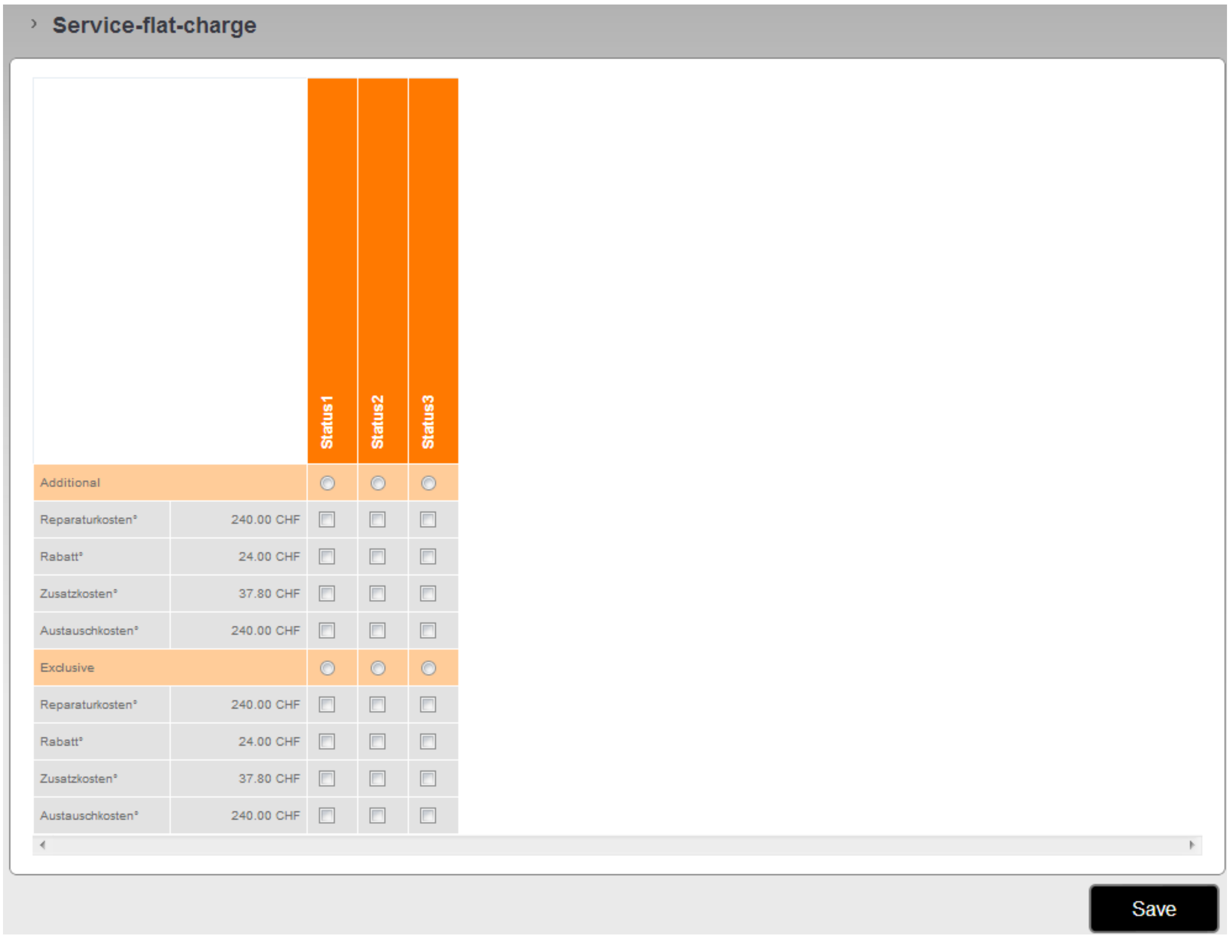

Similarly actions can be identified. These actions will be performed when the corresponding status is reached (For example notifications in possible cases of goodwill).



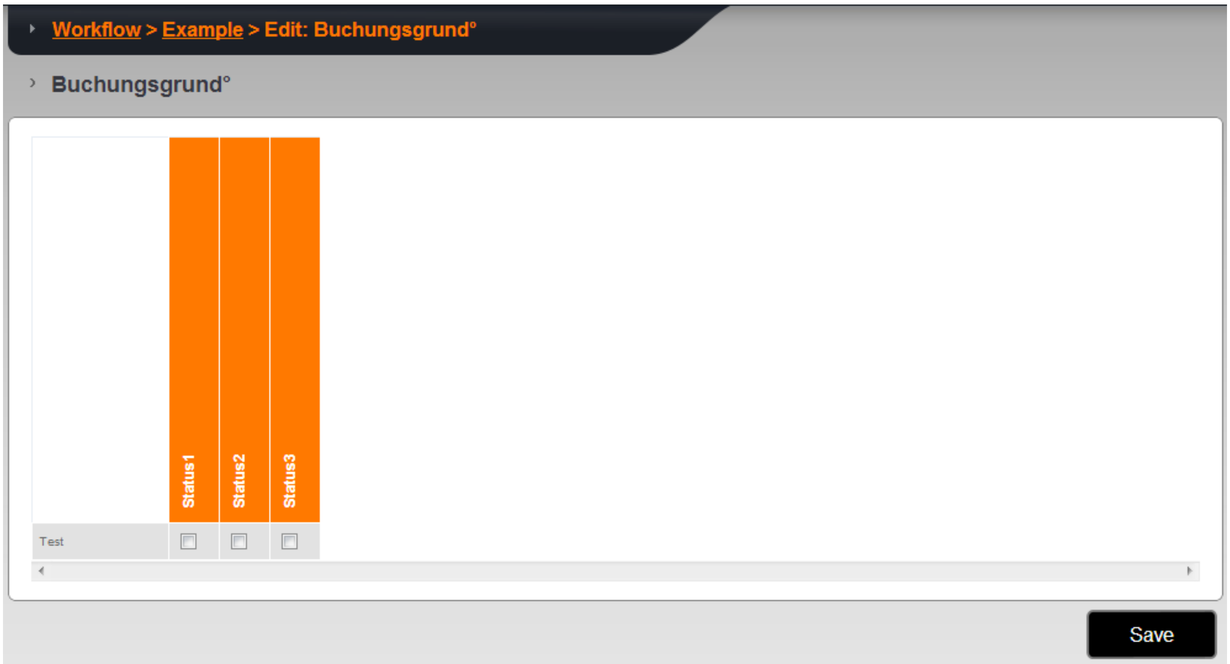

Similarly you can set Status-Conditions.




Similarly you can set Service-flat-charge. These costs will arise when the corresponding statues are reached.




Similarly you can set Status reasons.

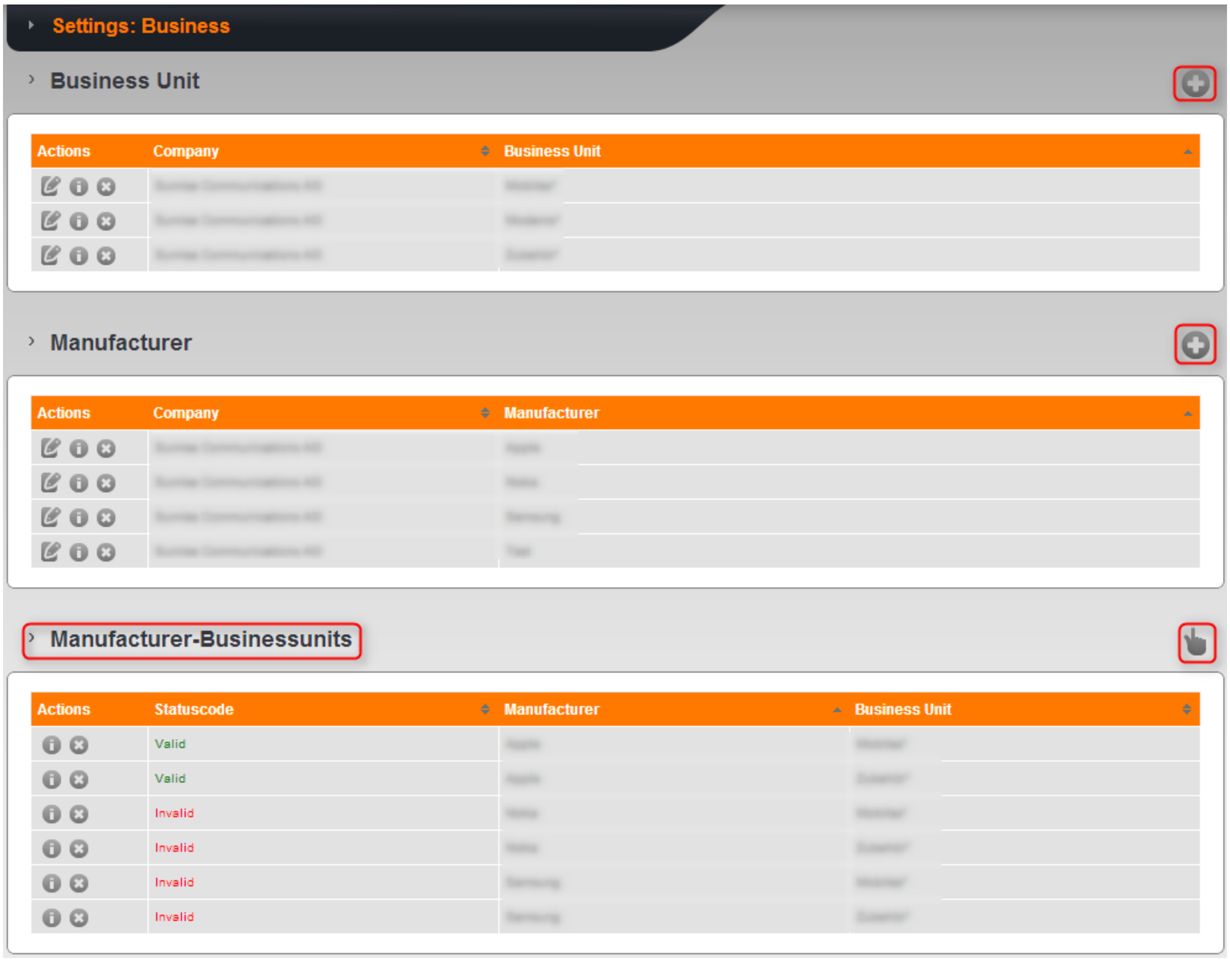



To add another Workflowstep click on the "Add" icon.

By clicking on each status settings like Status-Roles, Actions, Status-Conditions, Previous status, Document Template, Status-Reasons, Service-flat-charge, Customer-Email, Sms to Customer and External email can be edit.

## 10.14 Settings

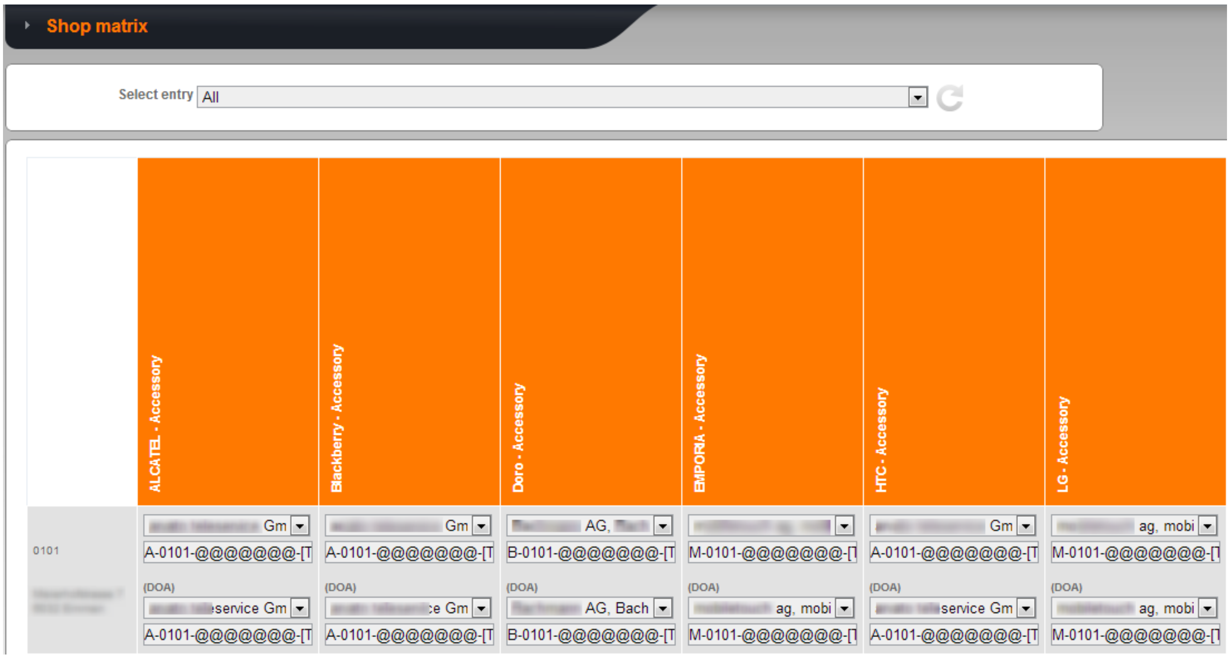
Under "**Administration - Settings**" you can set the business unit and manufacturer. Enter the company and the business unit or the manufacturer. Each combination of business unit and manufacturer will be determined individually.




## 10.15 Shop-Matrix

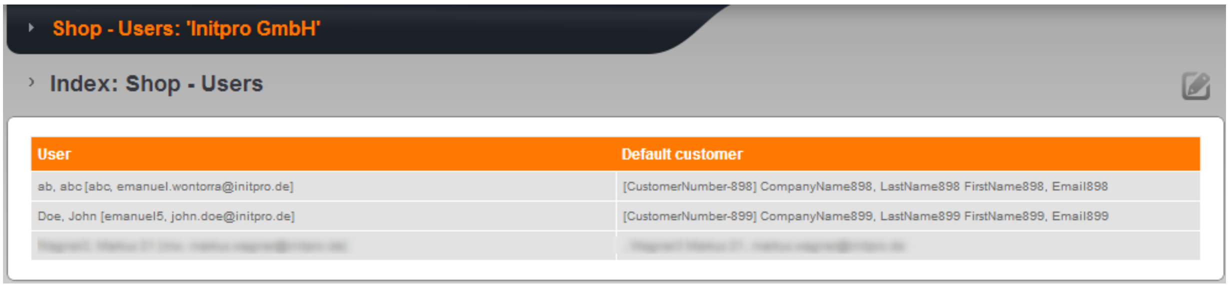
Here you can create a Shop-Matrix. In the Shop-Matrix you can set default Repaircenters and Servicecase Ordernumbers for each user. Select the user and click on the “submit” button. Now the Shop Matrix for that user will appear. In the first column the Manufacturer-Businessunits are listed. In the second column you can select a default Repaircenter by selecting it from the dropdown list. In the next column you can set a Servicecase order mask.

For DOA Servicecases other Repaircenters and Servicecase Ordernumbers can be set.




## 10.16 Shop – Users

Create here for your users a Default customer. For that, click on the edit button.

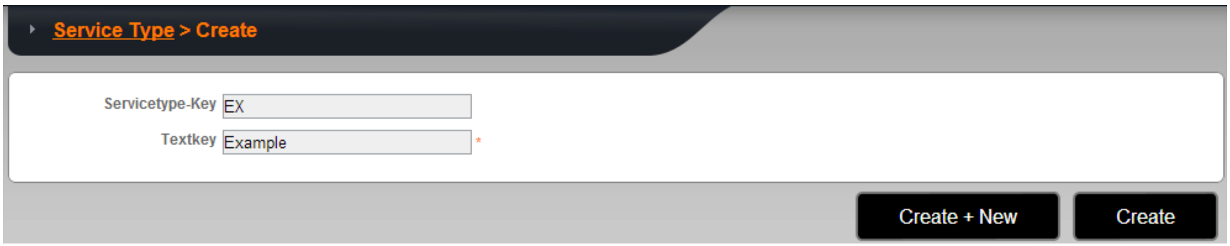



Now every registered user will appear. Select one of the listed default customers of the drop down list.


## 10.17 Service Type

The service type determines which repair services are offered to the customers. Click on "**Administration – Service Type**". And again there are a lot of System-Templates that you can use. If the needed Service Type is not listed in the System-Templates you can create your own.

To create your own Service Type, click on the "Add" icon. To complete click on "Create" or click on "Create + New" to add another Service Type.

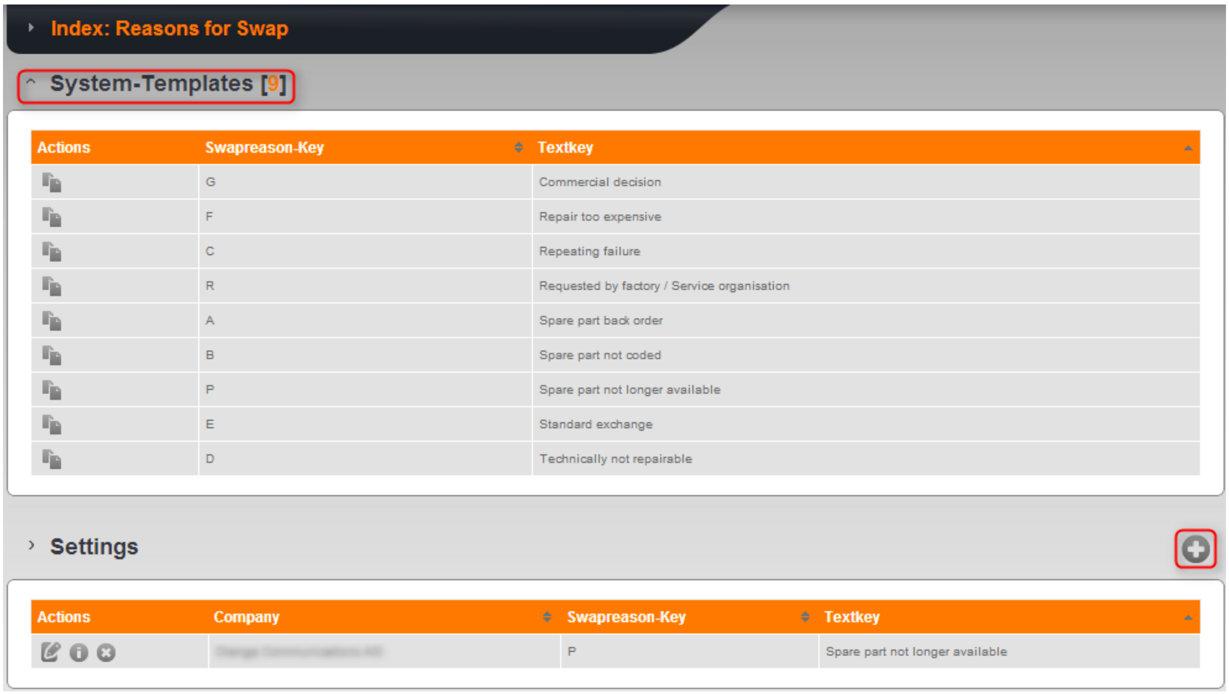


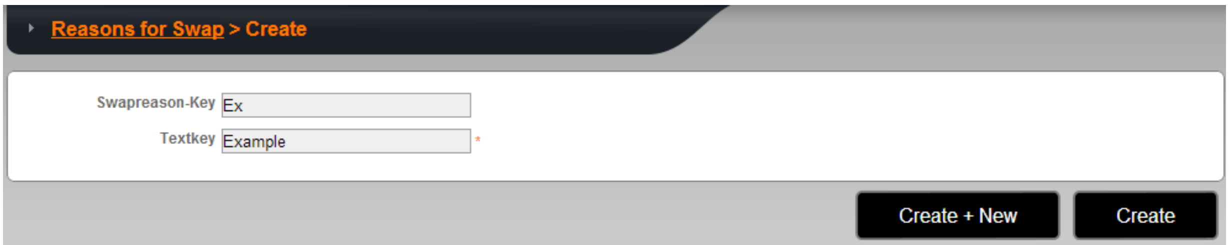

## 10.18 Status-Reason

To create state-justifications, click on the "Add" icon next to "Index". Now enter a text key (required), Description and Status Key.

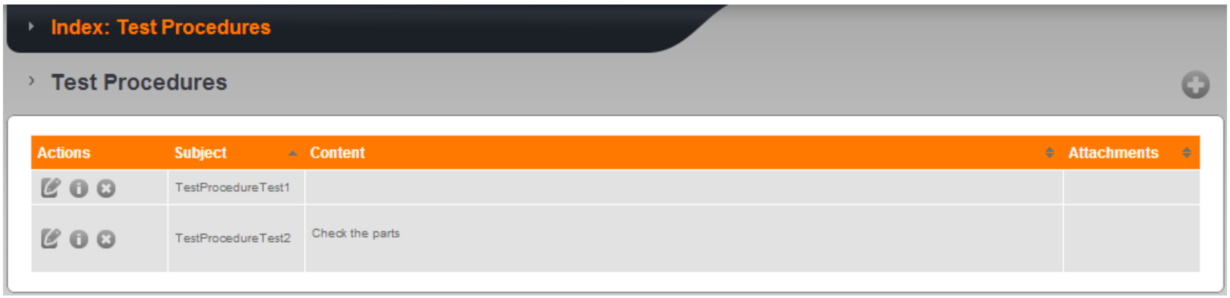

## 10.19 Reason for Swap

If the repair is not possible for a device it is advantageous to specify the reasons for swaps. To create possible reasons, enter Swapreason-key, and a Textkey. It is possible to use the system templates. To create your own Swapreason click on the "Add" icon. Enter a Swapreason-Key and a Textkey. To confirm, click on "Create" or click on "Create + New" to create the Swapreason and add another one.



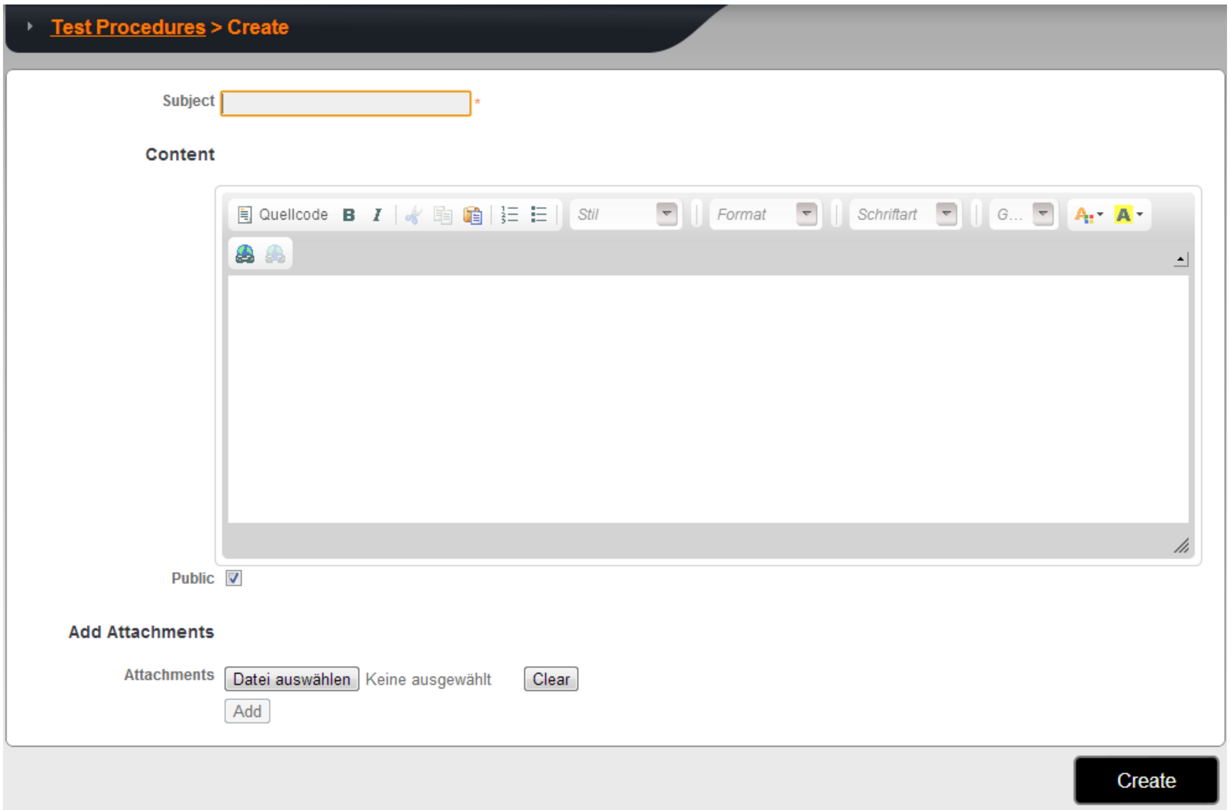



## 10.20 Test Procedures




Under "**Administration - Test Procedures**" Test Procedures can be described. To edit, delete or see the Informations of a Test Procedure click on the icons in the Actions column.

To add a Test Procedure click on the "Add" icon. Enter the Subject and type in the Test Procedure. You can add attachments (for example pictures, videos etc.).

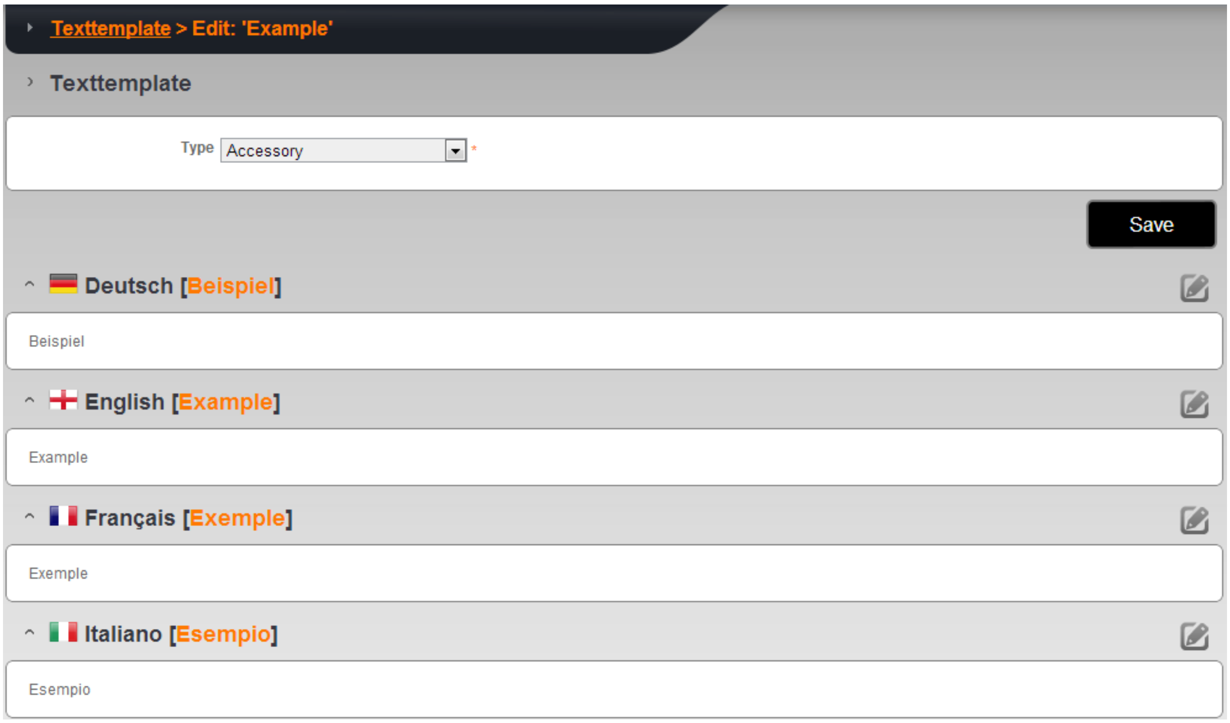



## 10.21 Texttemplate

Text templates serve to describe Accessory and Costestimation templates in several languages.

To create a Texttemplate, click on the "Add" icon under "**Administration – Texttemplate**". Now select the type of the Texttemplate (Accessory or Costestimation template) and enter a description. To complete, click on "Create" or click on "Create + New" to create that Texttemplate and stay on this page to create another one. After clicking on "Create", enter the meaning in different languages and enter descriptions. To complete click on "Save".

To edit or delete a Texttemplate, click on the icons in the action column.

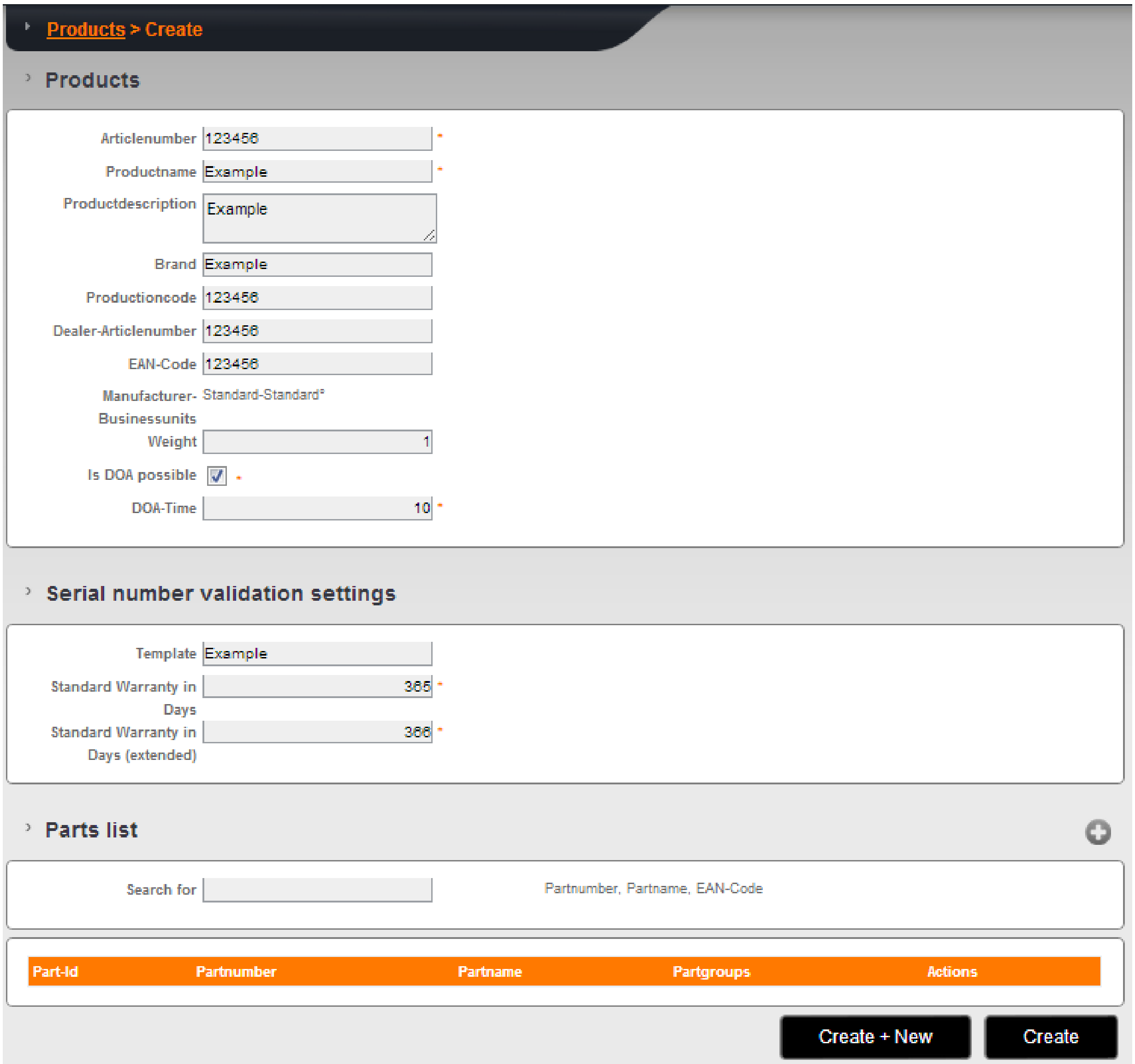




| Actions | Type | Template |
|---|---|---|
| Accessory | | |
| | Accessory | Battery |
| | Accessory | Charger |
| | Accessory | data cable |
| | Accessory | memory card |
| | Accessory | Headset |
| | Accessory | SIM Reader |
| | Accessory | casing |
| | Accessory | pen |
| | Accessory | original packaged and complete |
| | Accessory | warranty paper |


## 10.22 Product

To add your products, click on the "Add" icon in "**Administration - Product**". Enter the Articlenumber and Productname and select the Manufacturer and the Businessunit of the product. For each product you can add additional information (such as: Productdescription, Brand, Productioncode number, Dealer-Articlenumber, etc.). To use the Serial number validation, please enter Standard Warranty in Days. It is also possible to add parts to this product. Select the parts out of the parts list or click on the “Add” icon to create a new part.

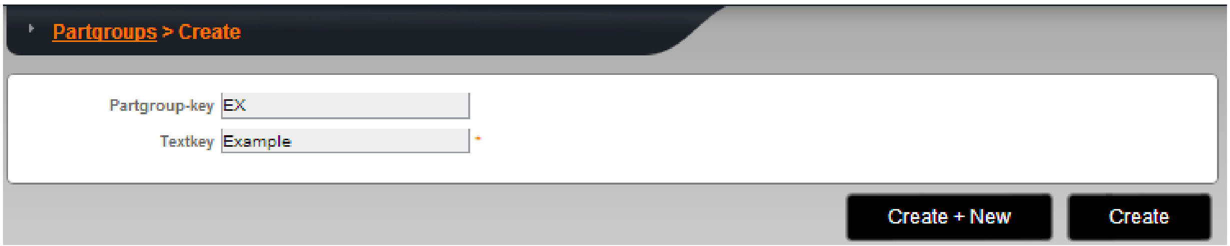



Please also note **10.21 Import / Export**

In order to find already existing products, enter your product into search line. It doesn't matter whether you enter the Brand, Productname, Articlenumber, EAN-Code, Dealer-Articlenumber or Productdescription.

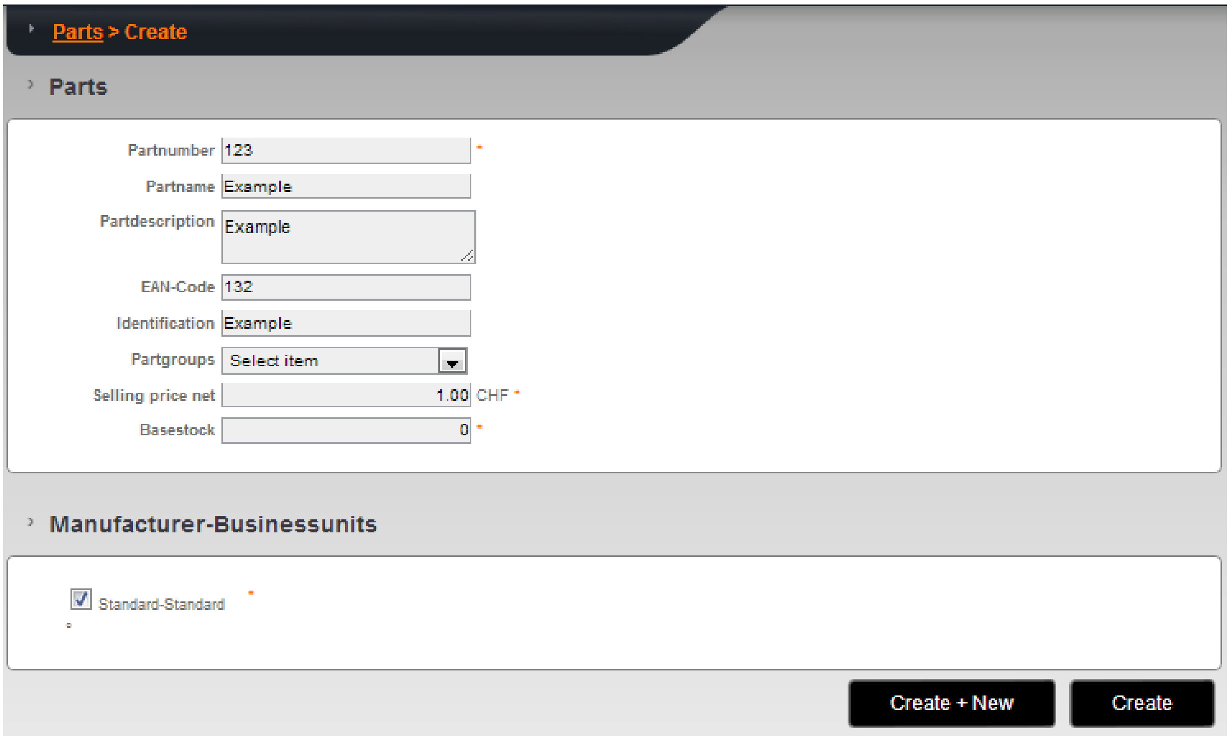
## 10.23 Partgroups

Partgroups will help you to organize components and are created in "**Administration - Partgroups**". To create a Partgroup, enter the Partgroup-key and a Textkey. To confirm, click on "Create" or click on "Create + New" to create the Partgroup and add another one.




## 10.24 Parts

Create in "**Administration - Parts**" a data set for your parts. Enter the dates of your parts. partnumber, selling price net and basestock are mandatory fields. The parts have to be assigned to manufacturer-business units. To confirm, click on "Create" or click on "Create + New" to create the Part and add another one.

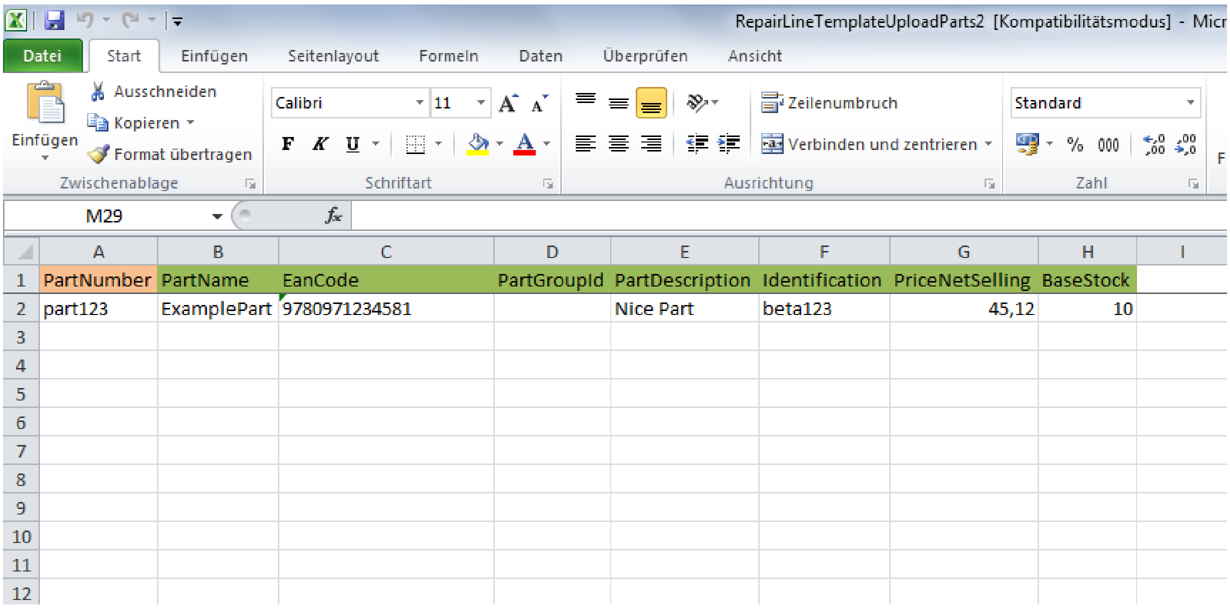



Please also note **10.21 Import / Export**

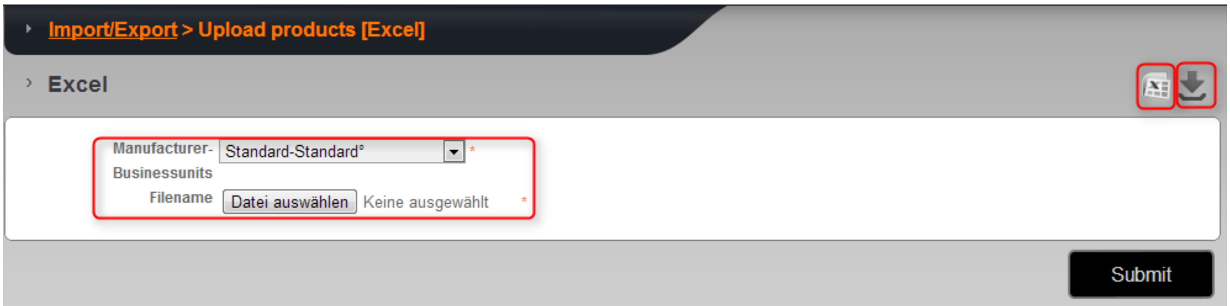
In order to find already existing components, type in the search line, type your product. It doesn't matter whether you enter part number, part name, or UPC code.

## 10.25 Import/Export

To add so many products / parts is time-consuming and labor. Under "**Administration - Import / Export**" it is possible to transfer your products / parts quickly and easily from an Excel file. Download the template Excel files and enter your product / part data. Select the appropriate manufacturer-business unit and specify the file name.



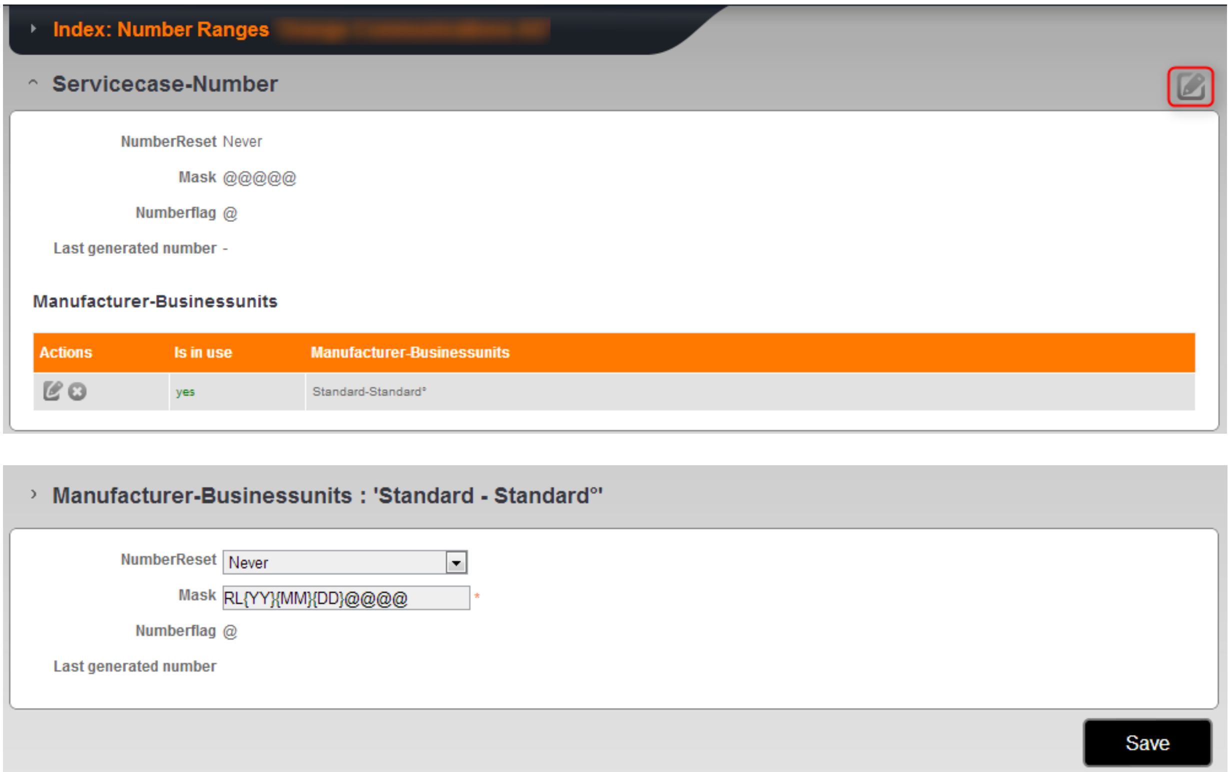

To download the Excel-file template click on the "Excel" icon to download the products / parts Excel file click on the "Download" icon.




Already created products / parts can be downloaded as an Excel file, for example to edit changes.

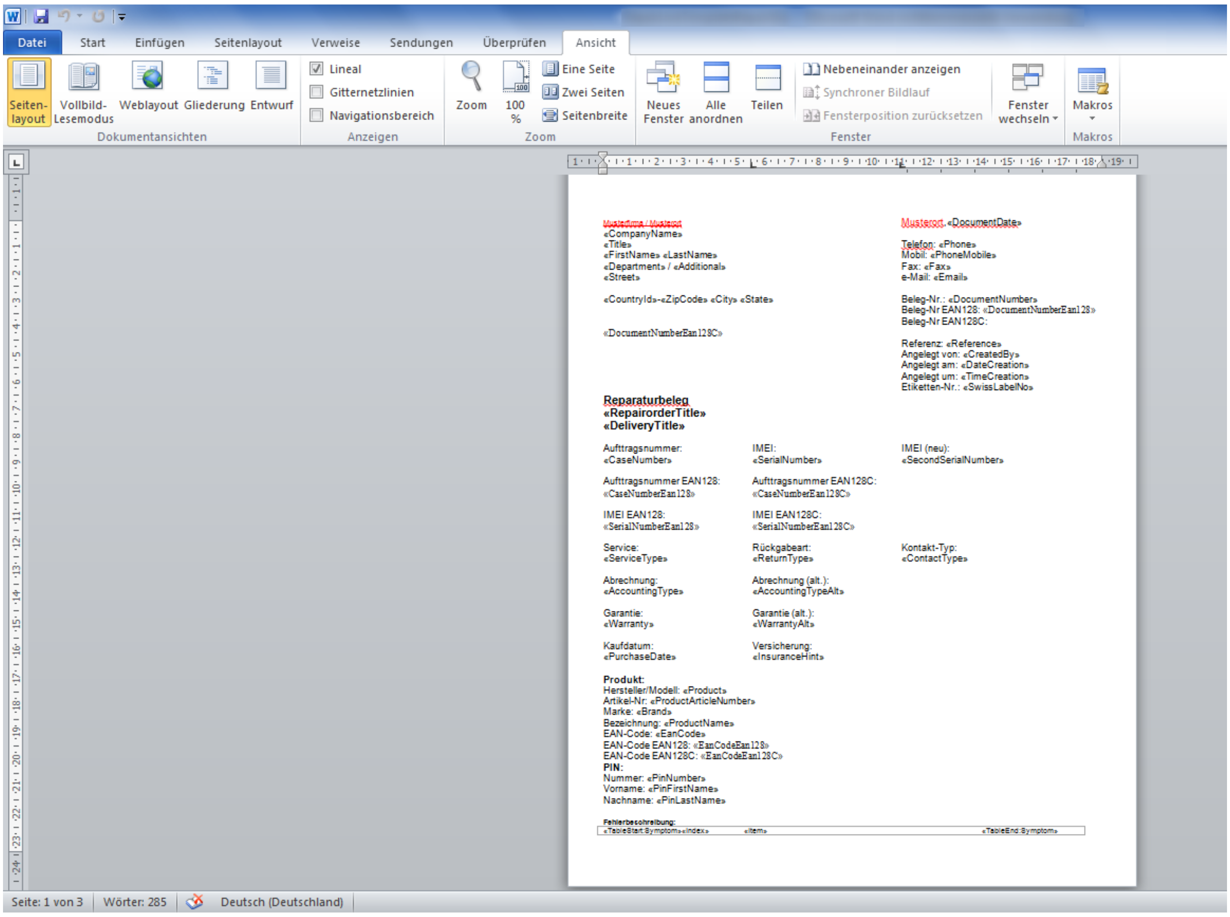
## 10.26 Number Ranges

Under "**Administration - Number Ranges**" you have the possibility to create number ranges for Servicecase-Numbers, customernumbers, suppliernumber, delivery notes, costestimation, invoice, partorder, ticketnumber and equipment rental. Select the date of the numbers-reset and the mask.

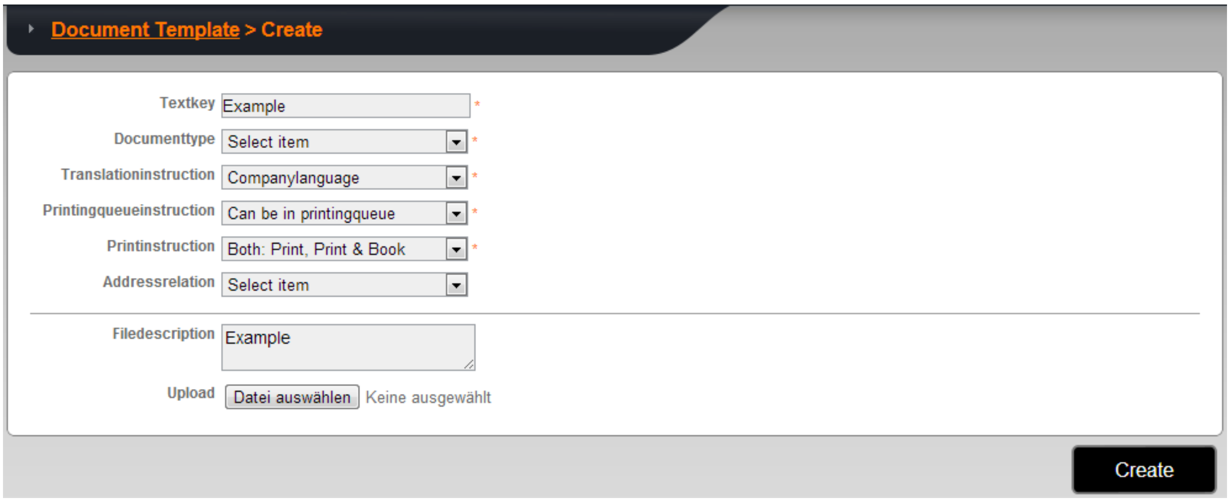



## 10.27 Document Template

Repairline offers under "**Administration - Document Template**" a set of document templates (such as a template for a repair slip).




To use your own created templates, click on the "Add" icon and upload your template.



# 11. Documents

## 11.1 Documents to print

Under “**Documents - Documents to print**“, all the documents that need to be printed and sent out, will appear. In the "Actions" column, you can print, delete or show the documents detailed by clicking the symbols.

## 11.2 Document Archive

Under **"Documents - Document Archive"** you can search every document by using the filters.

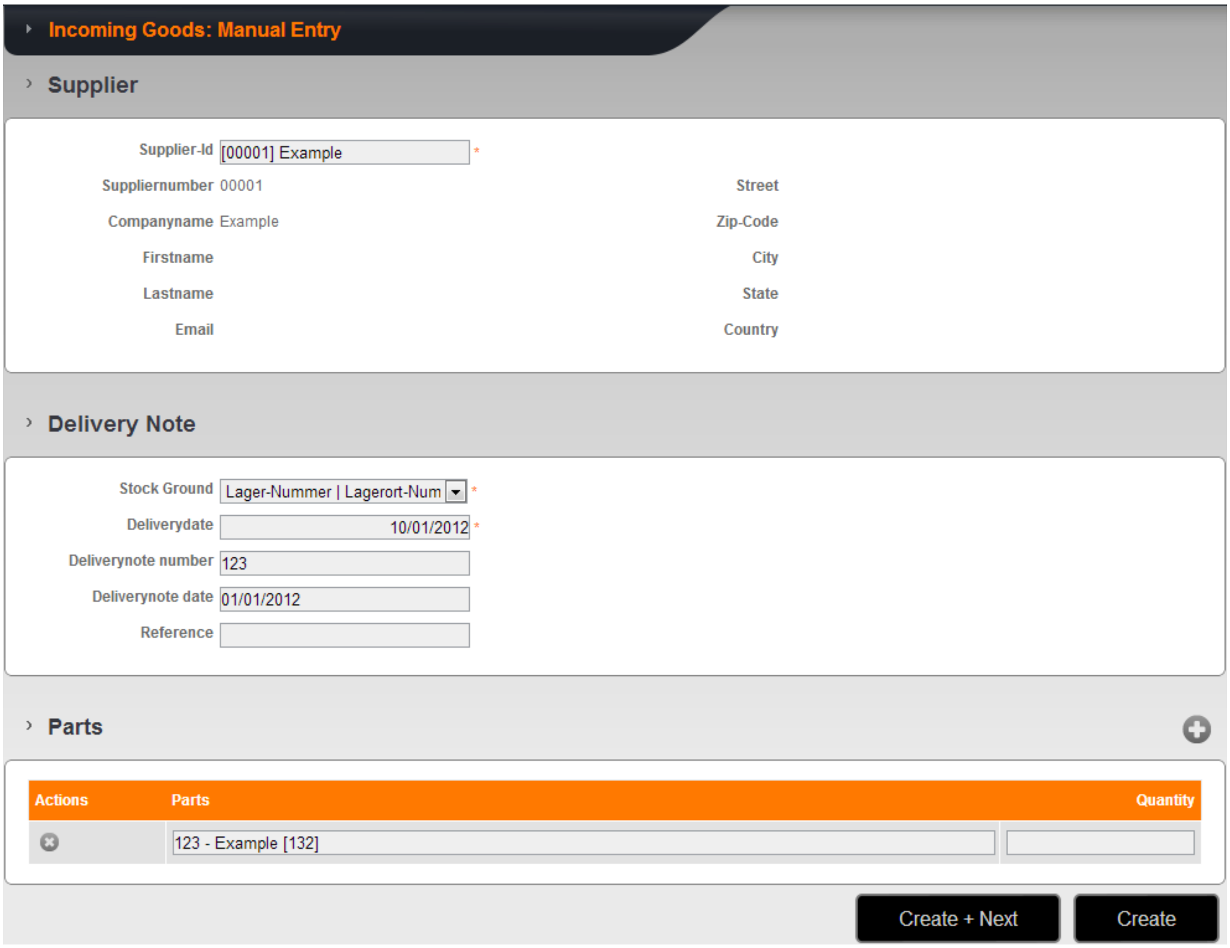

## 11 Stock

## 11.1 Incoming Goods

Repairline features a comfortable warehouse management. Under “**Stock**” you can manage your whole warehouse management.

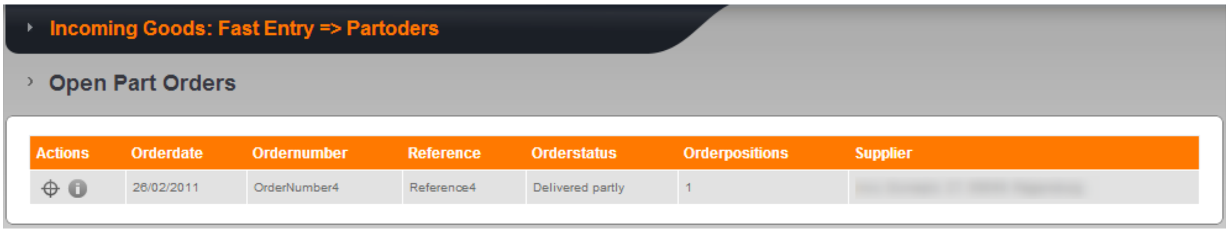
Incoming goods are entered in “**Stock – Incoming Goods**”. At first enter the Supplier ID (If you have not create them please do that first at “**Procurement – Supplier**”). Every part in the stock must obtain an assigned stock ground (Please enter your stock grounds at “**Stock – Stock Ground**”). Define therefore, on which stock ground the parts are to be stored. Enter the delivery date. You can also enter the delivery number and reference.

Now enter the name of the part and the amount of delivery. By clicking the "delete" icon in the "Actions" column, you can delete unwanted lines. Beyond these three components is required for each additional component a new line. To add a line, click on the "Add" icon. To complete, click “Create“, or click on “Create + New” to enter another income.




## 12.2 Fast Entry

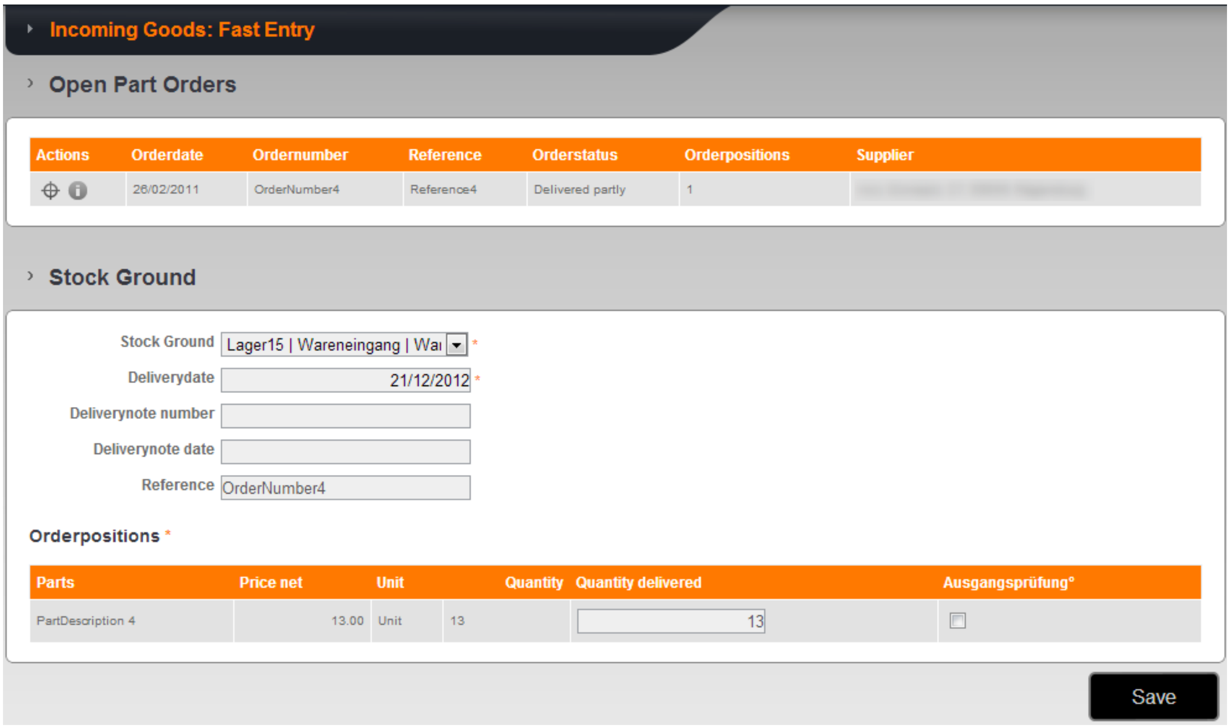
Here you have the opinion to entry your incoming goods very easy and fast. Under "**Stock – Fast Entry**" you will find all the Open Part Orders (see on 12.4) that have been created. (To create a part order, click on "**My Account - Personal Requisition Notes**") or created them while entering a Servicecase)




Click on the "Info" icon in the "Actions" column to look on informations like Supplier, Partoders and Orderpositions.

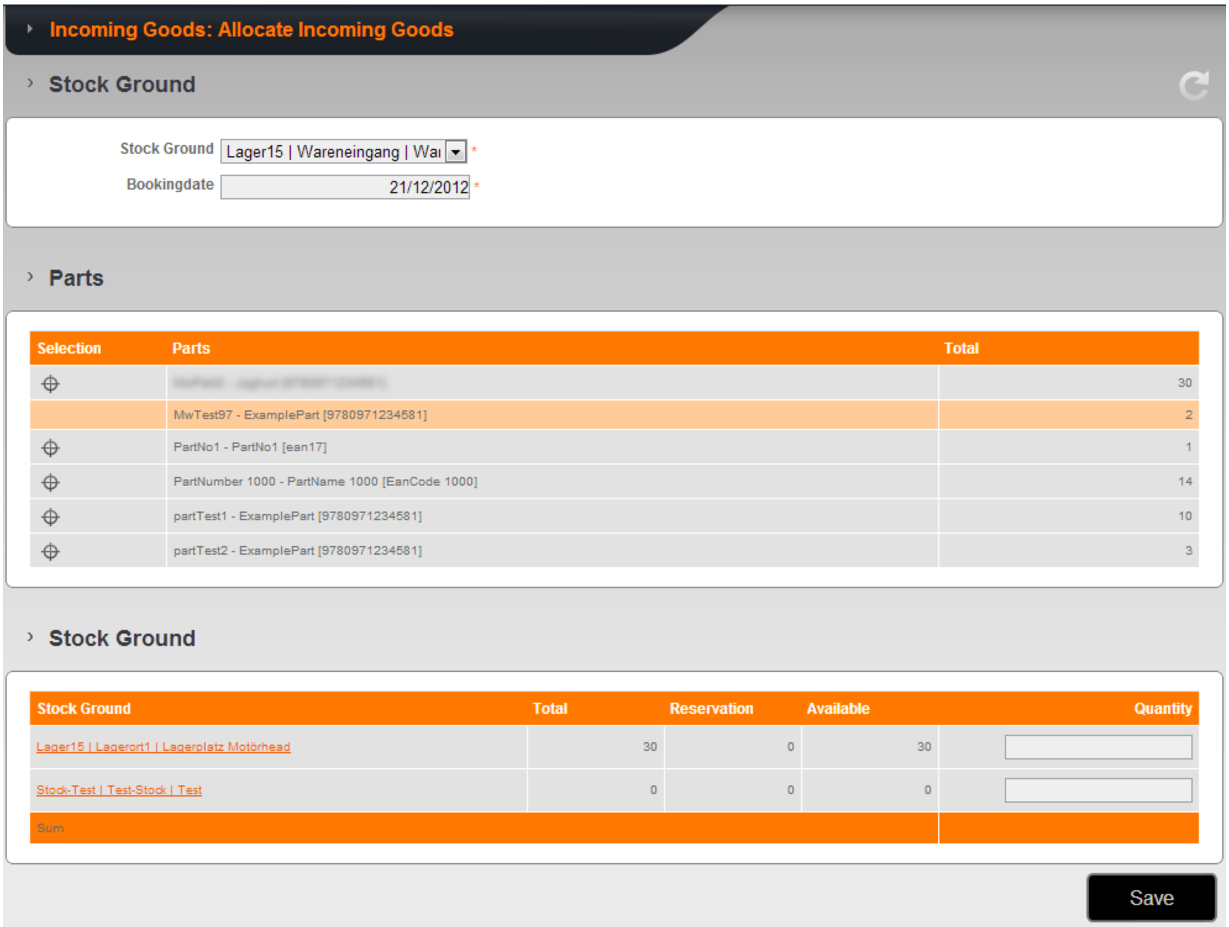
Click on the "Select" icon to entry the incoming goods. Now the Stock Ground Informations will appear. Select the Stock Ground and enter the Deliverydate. You can also enter Deliverynote number and date and a reference.

After that check the Quantity if the Order-Quantity doesn't match with the Delivery-Quantity please enter the Delivery-Quantity. If an exit check has been done set a check mark to exit check.



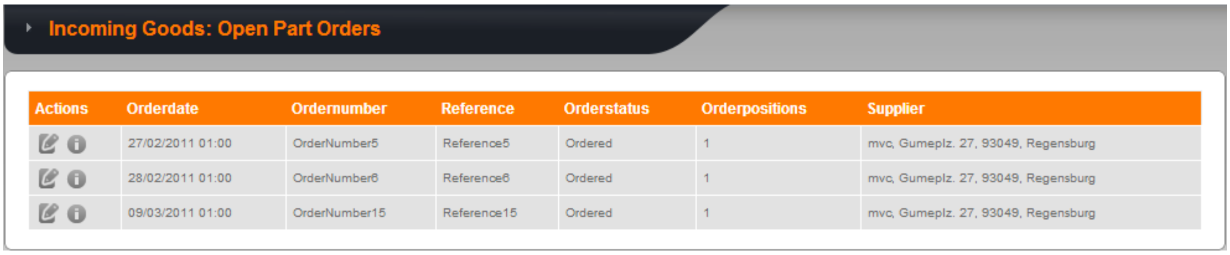

## 12.3 Allocate Incoming Goods

Here you control the transfer of the incoming goods into the Stock Grounds. To allocate your goods select your Stock Ground and the Bookingdate. Now all Parts of this Stock Ground will appear. Select the desired Part by clicking on the "Select" icon. The other Stock Ground will appear now. Enter the Quantity in the line of the desired Stock Ground. To complete click on "Save".

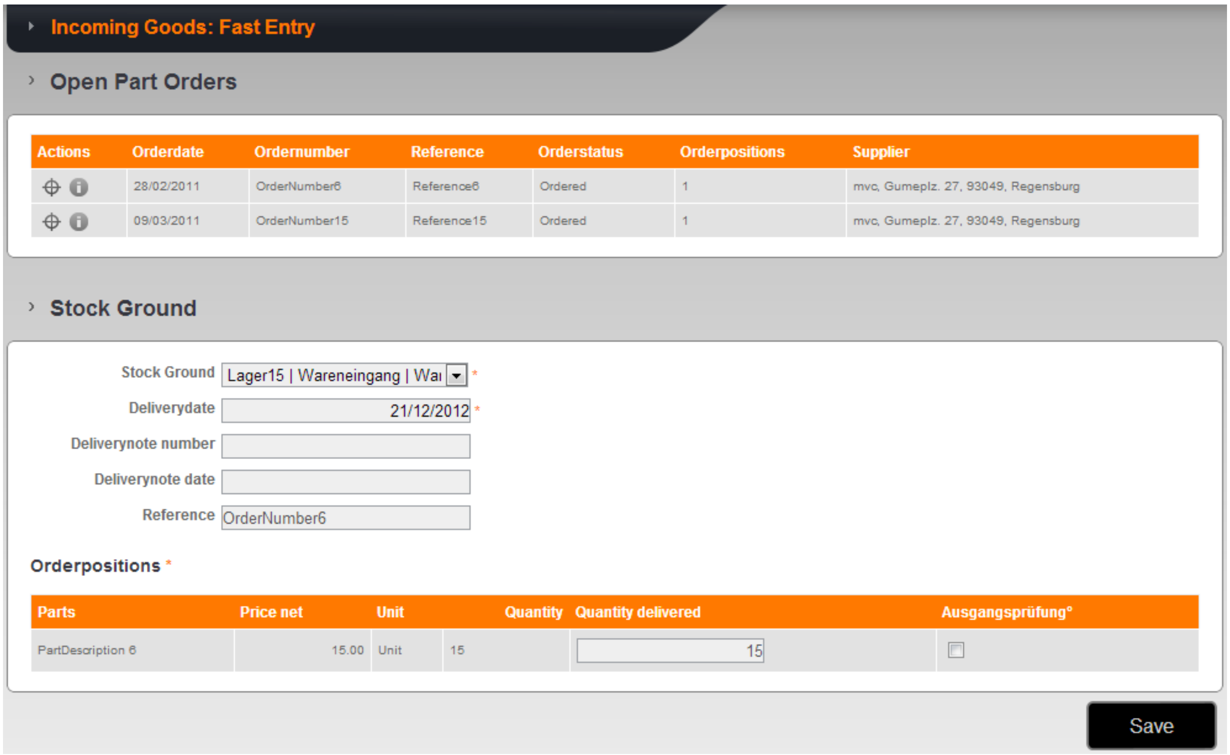



## 12.4 Open Part Orders

Under "**Stock - Open Part Orders**" you find all of your part orders that have been created.




Click on the “Info” icon in the “Actions” column to look on Informations like Supplier, Partoders and Orderpositions. You can print or cancel the order by clicking on the icons on the top right.

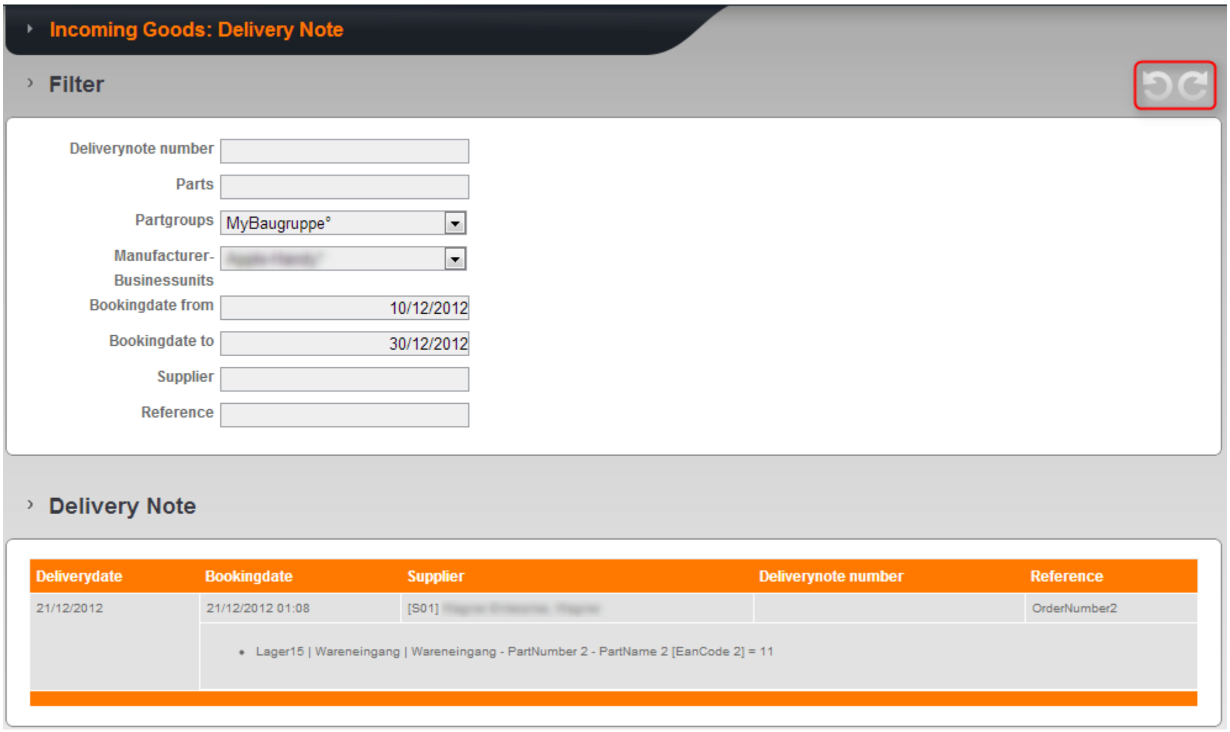



By clicking on the "Edit" icon the Stock Ground Informations will appear. Select the Stock Ground and enter the Deliverydate. You can also enter Deliverynote number and date and a reference.

After that please check the Quantity if the Order-Quantity doesn't match with the Delivery-Quantity please enter the Delivery-Quantity. If an exit check has been done set a check mark to exit check. To complete click on "Save". Now the Order is finish it will be delete automatically form your Open Parts Order List.

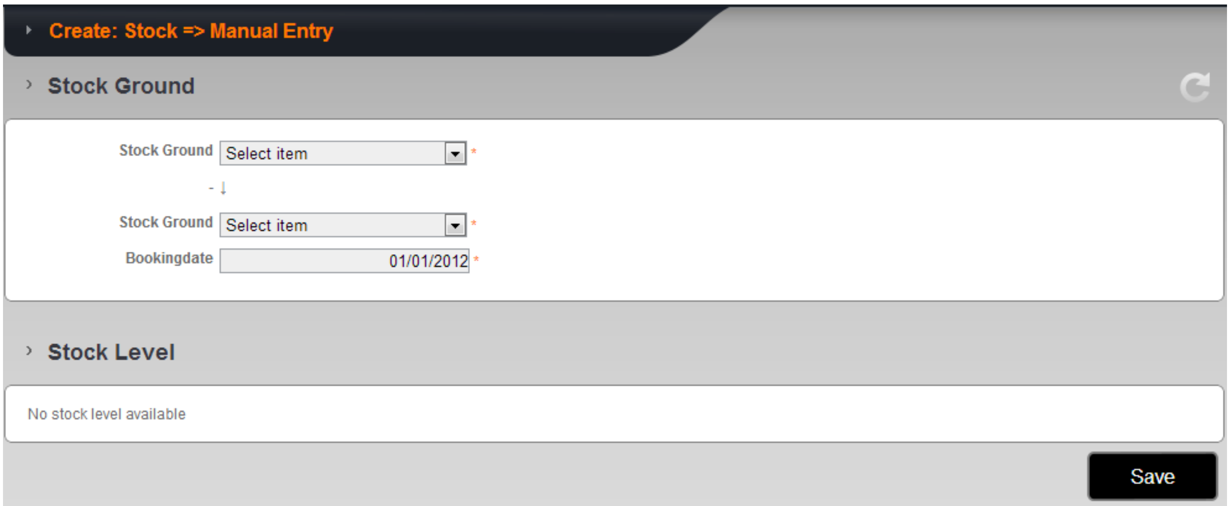
## 12.5 Delivery Note

Here you'll find the list of all of your delivery notes. Use the many filters, such as Partgroups, Deliverynote number, manufacturer-business units, Bookingdate from, etc., so that your search specifically to the desired result.




## 12.6 Manual Entry

Make here the transfer of Parts between your Stock Ground. Select the Stock Grounds, which will take place between the transfers and enter the posting date.

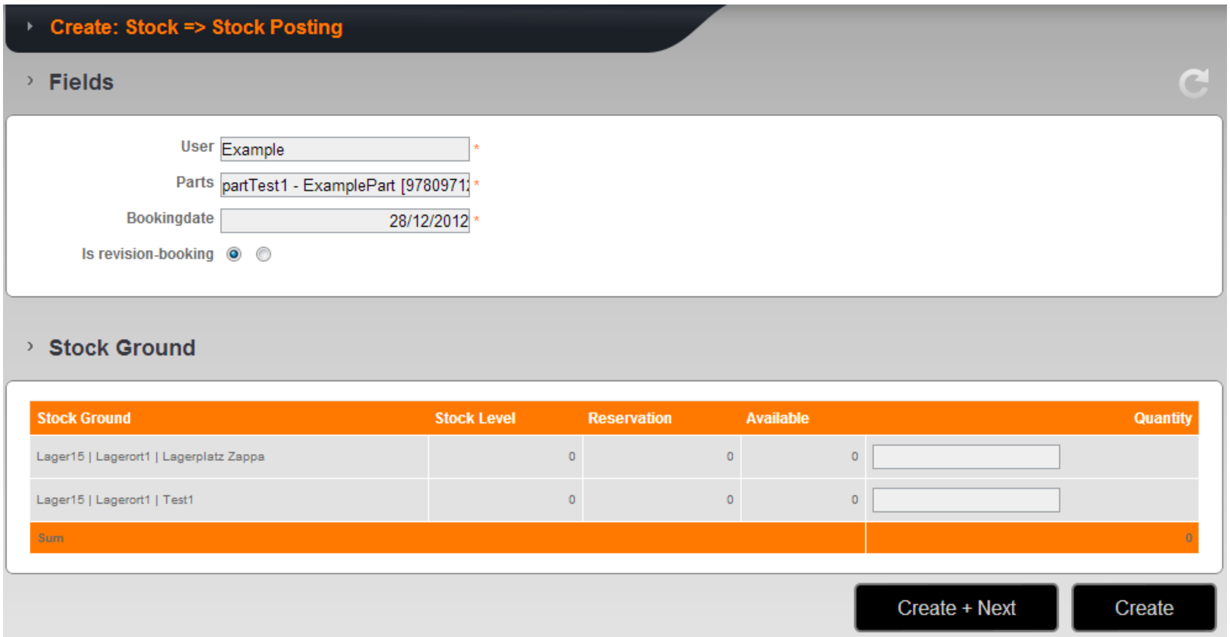



## 12.7 Stock Requisition

In "**Stock - Stock Requisition**" parts can manually be taken (without a regard to a Servicecase). Specify the user, the part and the booking date. Now appear all storage bins (with stock) having the specified component. Now enter each amount that you take to the line of the Stock Ground. To complete, click on "Create" or click on "Create + Next" to perform more Stock Requisition.


## 12.8 Stock Posting

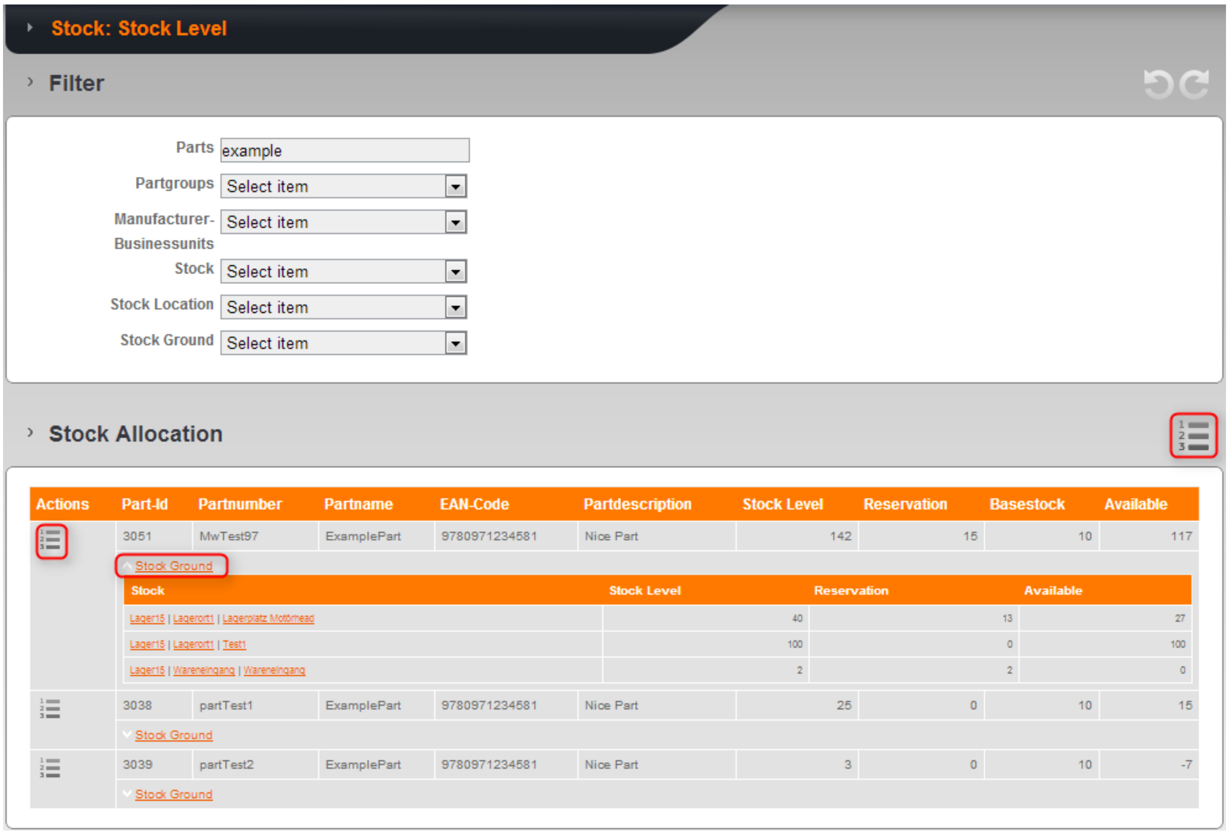
Under "**Stock - Stock Posting**" you can manually add Parts to your Stock Grounds. Specify the User, the Part and the Booking Date. Now all Stock Grounds that can store the specified Part will appear. Now enter each amount that you add to the Stock Grounds. To complete, click on "Create" or click on "Create + Next" to add more Parts to your Stock Grounds.

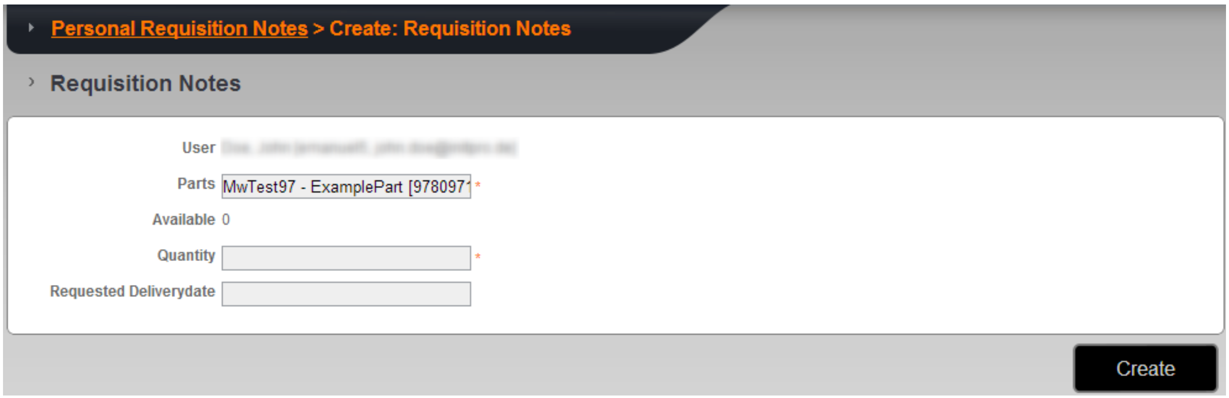



## 12.9 Stock Level

Under "**Stock – Stock Level**" you can obtain an overview of the Quantity in your Stocks.

To determine your Stock Levels, use the filters. You can use the filters: Parts, Partgroup, Manufacturer-BusinessUnits, Stock, Stock Location and Stock Ground singly or all at once. Now the Parts and the Parts Informations (like Part-Id, Basestock, EAN-Code etc.) will appear. By clicking on "Stock Ground" ever Stock that has that Part will appear. This will show you the exact storage location, the Stock Level, how many Parts are reserved and how many Parts are available. To request a requisition for one Part, click on the "Request" icon in the "Actions" column. Now enter quantity and required delivery date and click on "Create". To create a common request you have to click on the "**Request**" icon on the top right.



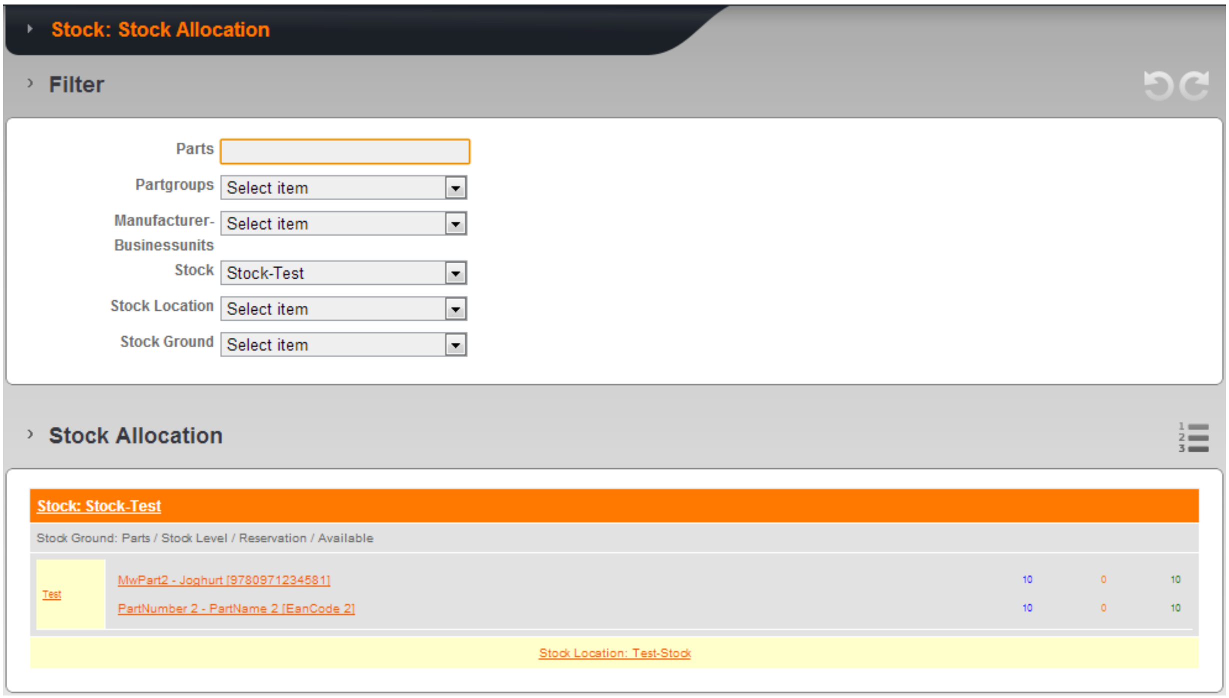




## 12.10 Stock Allocation

Under "**Stock – Stock Level**" you can obtain an overview of your Stock Ground and the specific Parts of inventory.

Use the many filters, such as Parts, Partgroups, Manufacturer-Businessunits, Stock, Stock Location and Stock Ground so that your search shows you quickly the desired result.

To create a Request you have to click on the “**Request**” icon on the top right.

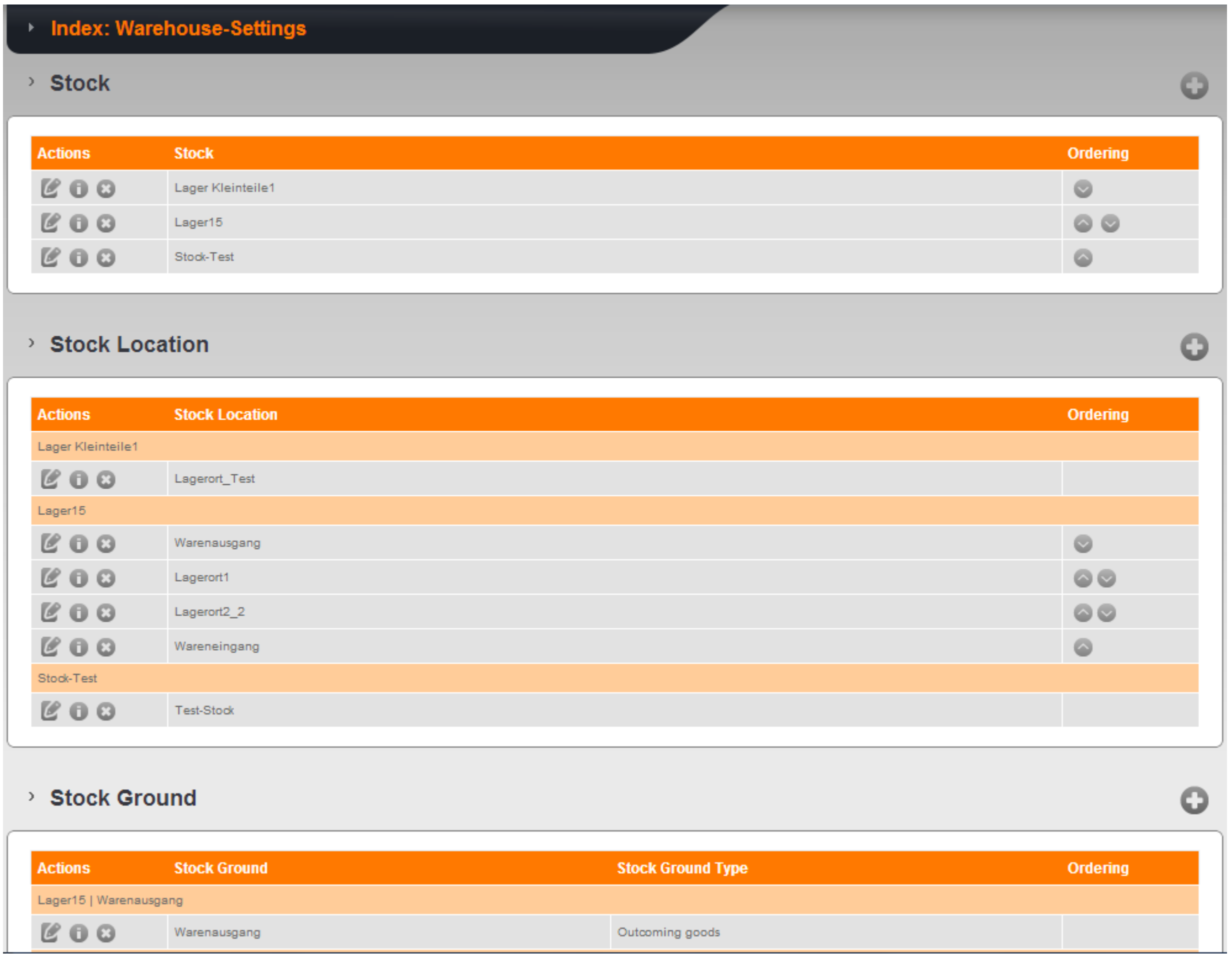



## 12.11 Stock Ground

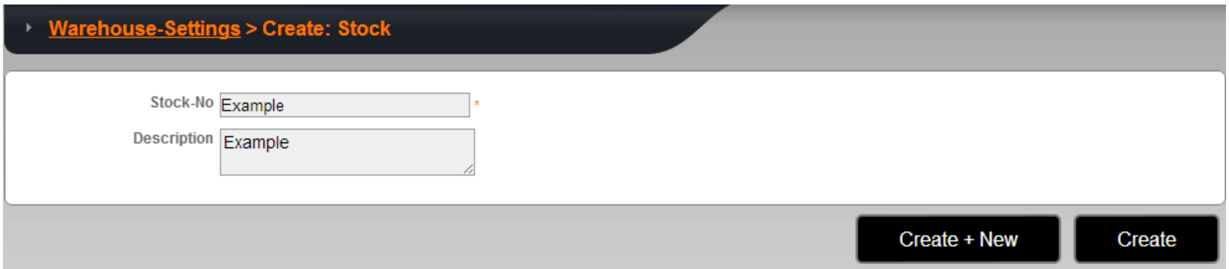
Here you can specify the settings for the name of your Stock and their order.

To rename a Stock (or Stock Location, Stock Ground) click on the "Edit" icon in the "Actions" column and enter the new name of the Stock. To delete a Stock (or Stock Location, Stock Ground), click on the “Delete” icon in the "Actions" column. To learn the details of a Stock (or Stock Location, Stock Ground), click on the “Details” icon in the "Actions" column.

By clicking on the "Up" and "Down" icons in the "Ordering" column, you can sort your Stocks / Stock Locations / Stock Grounds as you like.




To create a Stock, click on the "Add" icon and enter the name of the Stock (you have the possibility to type in a description of that Stock). To complete, click on “Create” or click on “Create + New” to add another Stock.




To create a Stock Location, click on the "Add" icon and enter the name of the Stock Location (you have the possibility to type in a description of that Stock Location) and assign a Stock to that Stock Location. To complete, click on “Create” or click on “Create + New” to add another Stock Location.

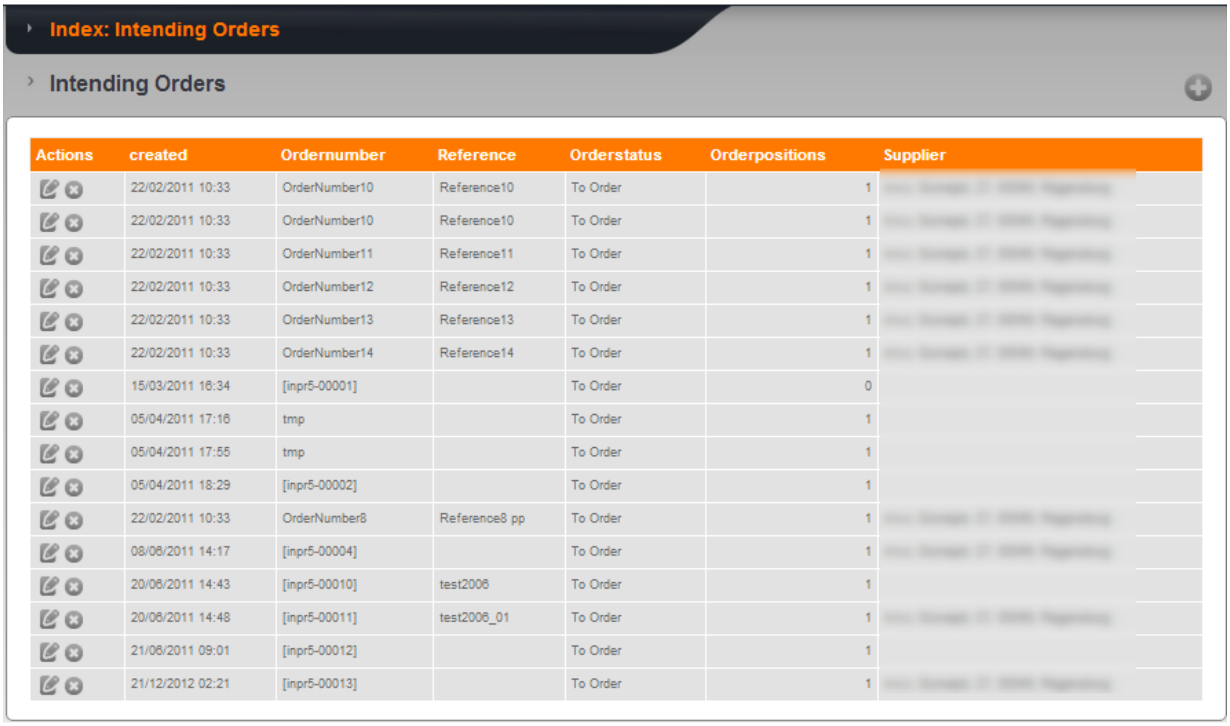

To create a Stock Ground, click on the "Add" icon and enter the name of the Stock Ground (you have the possibility to type in a description of that Stock Ground) and assign a Stock and a Stock Location to that Stock Ground. To complete, click on “Create” or click on “Create + New” to add another Stock Ground.


Each Stock Ground must be assigned to a Stock Location and each Stock Location must be assigned to a Stock!

# 13 Procurement

## 13.1 Intending Orders

Under "**Intending Orders**" you will see all the Part Orders that has to be finished. To delete an Intending Order, click on the “Delete” icon in the "Actions" column. Click on the "Edit" icon in the "Actions" column to learn the details of the planned order.

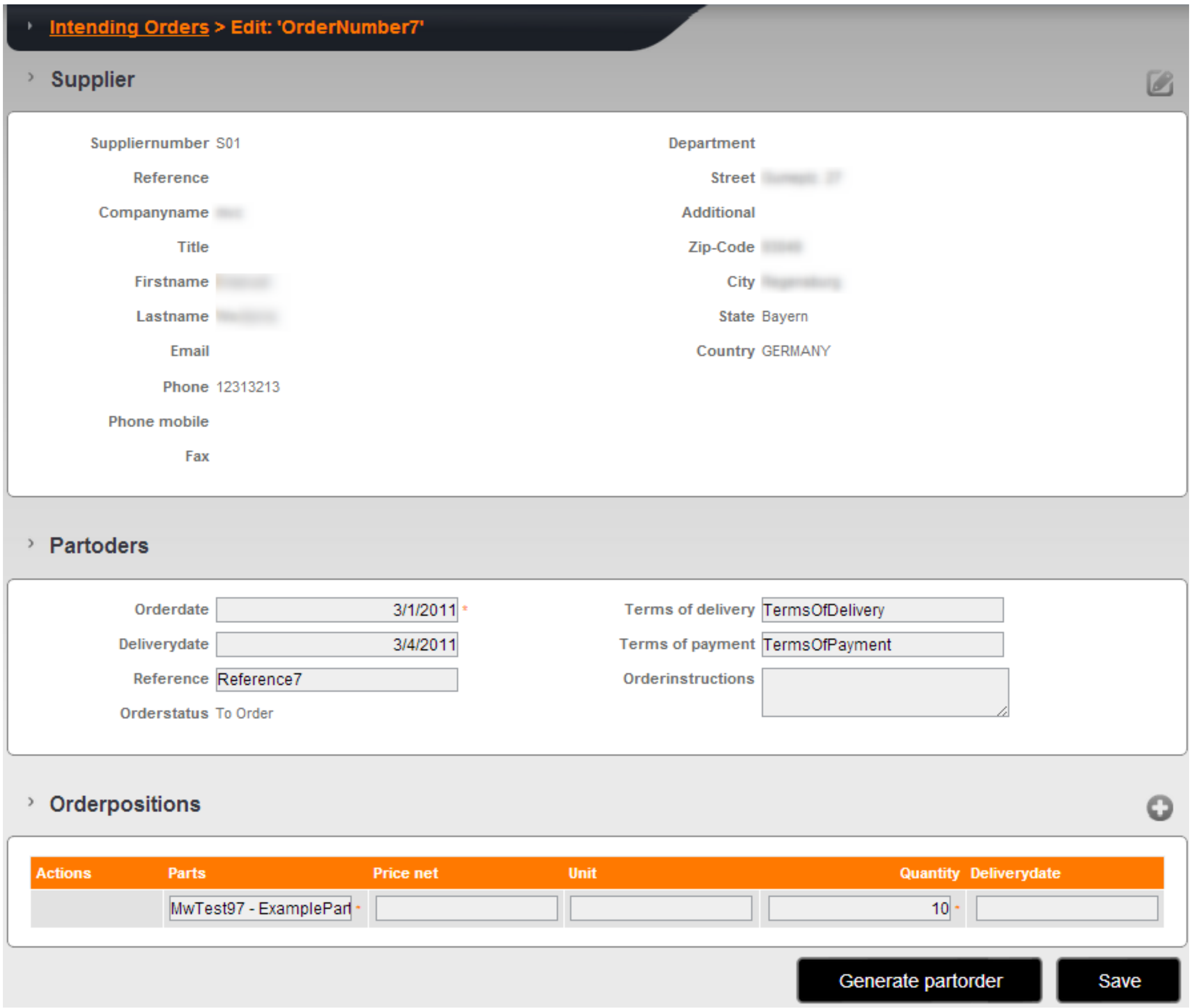


Index: Intending Orders

Intending Orders

| Actions | created | Ordernumber | Reference | Orderstatus | Orderpositions | Supplier |
|---|---|---|---|---|---|---|
| | 22/02/2011 10:33 | OrderNumber10 | Reference10 | To Order | 1 | |
| | 22/02/2011 10:33 | OrderNumber10 | Reference10 | To Order | 1 | |
| | 22/02/2011 10:33 | OrderNumber11 | Reference11 | To Order | 1 | |
| | 22/02/2011 10:33 | OrderNumber12 | Reference12 | To Order | 1 | |
| | 22/02/2011 10:33 | OrderNumber13 | Reference13 | To Order | 1 | |
| | 22/02/2011 10:33 | OrderNumber14 | Reference14 | To Order | 1 | |
| | 15/03/2011 16:34 | [inpr5-00001] | | To Order | 0 | |
| | 05/04/2011 17:16 | tmp | | To Order | 1 | |
| | 05/04/2011 17:55 | tmp | | To Order | 1 | |
| | 05/04/2011 18:29 | [inpr5-00002] | | To Order | 1 | |
| | 22/02/2011 10:33 | OrderNumber8 | Reference8 pp | To Order | 1 | |
| | 08/06/2011 14:17 | [inpr5-00004] | | To Order | 1 | |
| | 20/06/2011 14:43 | [inpr5-00010] | test2006 | To Order | 1 | |
| | 20/06/2011 14:48 | [inpr5-00011] | test2006_01 | To Order | 1 | |
| | 21/06/2011 09:01 | [inpr5-00012] | | To Order | 1 | |
| | 21/12/2012 02:21 | [inpr5-00013] | | To Order | 1 | |

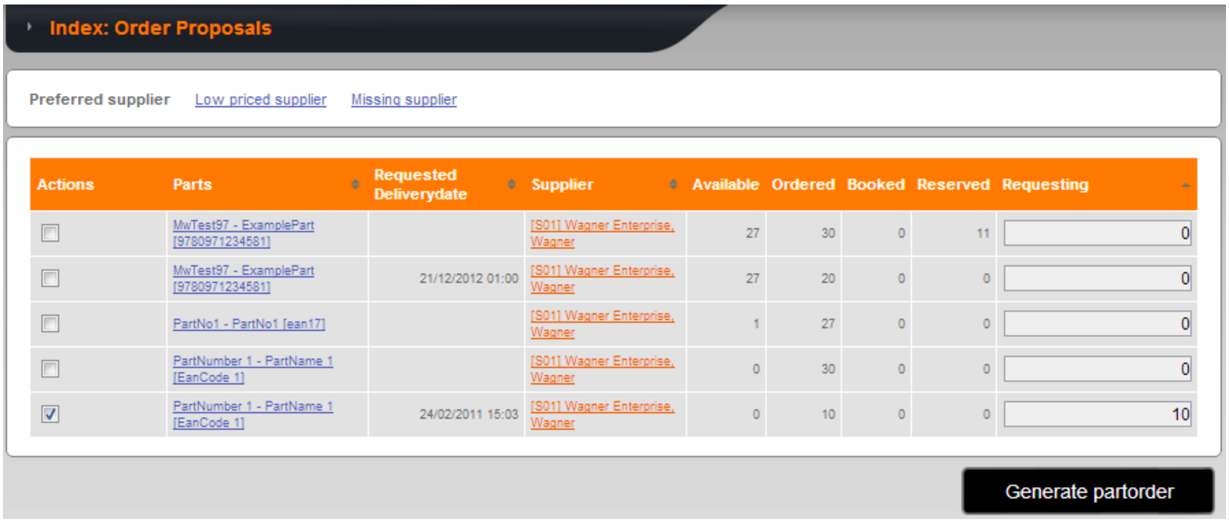
Create a Part Order by check the Supplier/Partoders/Orderpositons. To edit the Supplier, click on the "Edit" icon. Enter your Partorders and Orderpositons. (to add another Orderposition click on the "Add" icon. To complete click on "Generate Partorder" or click on "Save" to save the changes.



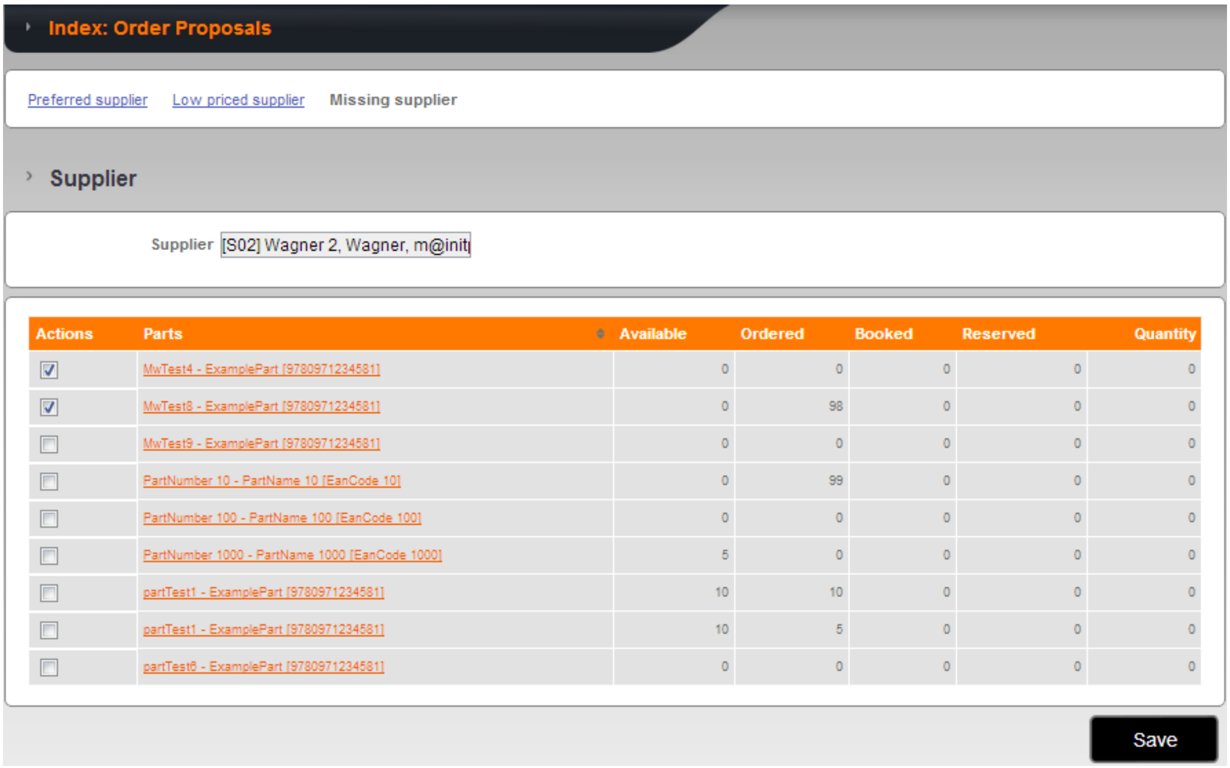

## 13.2 Order Proposals

Under „Procurement – Order Proposals“, you can create Purchase Orders dependent on Requisition Notes.

The Order Proposals are grouped into Preferred Supplier, Low Priced Supplier and Missing Supplier. To generate a Partorder, set a checkmark in the "Actions" column to each Part for which a Partorder is to be made and enter the requesting amount. To complete, click on “Generate Partorder”.



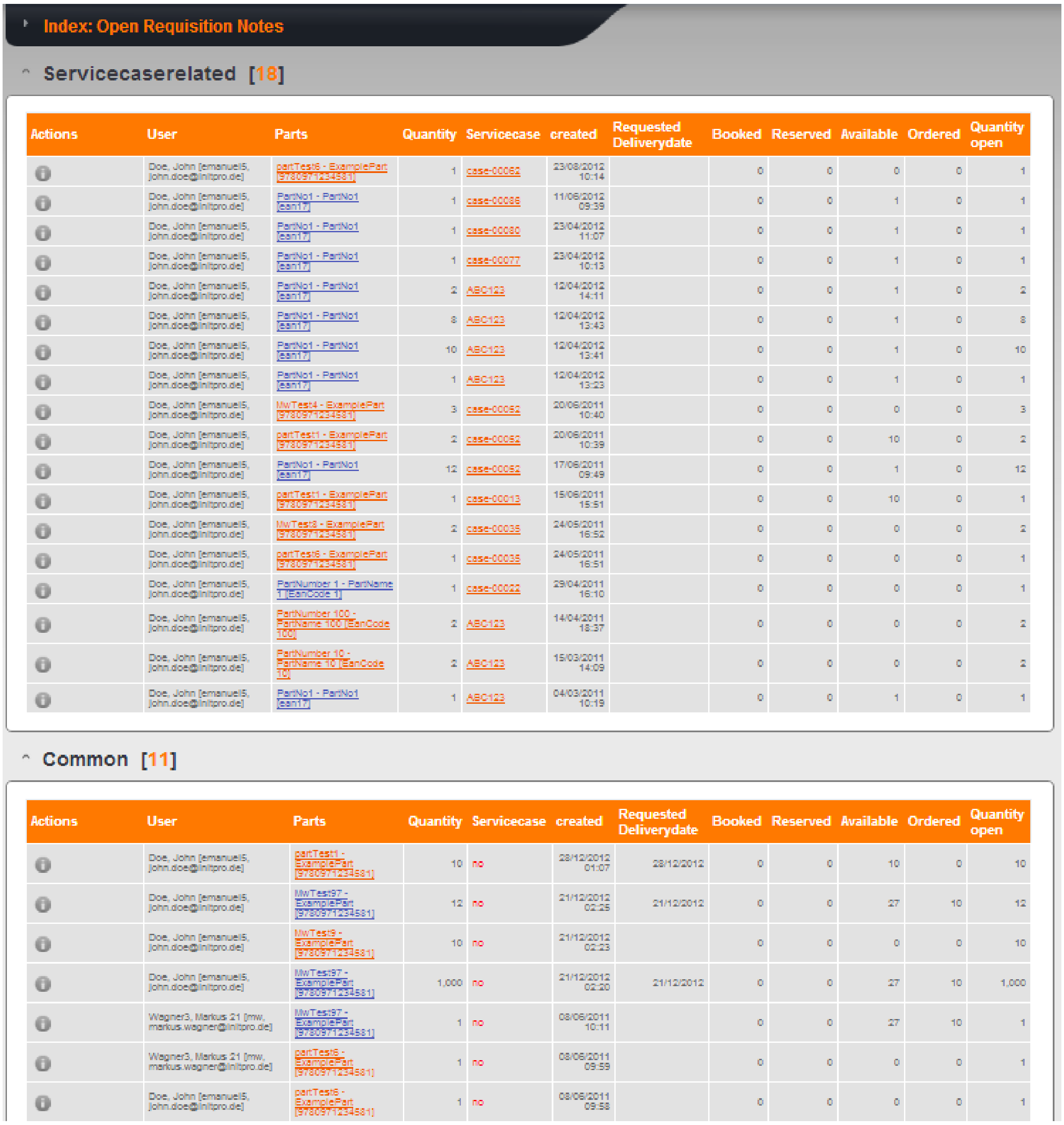

To see all the Parts with missing suppliers click on “Missing Supplier”. Type in the name of the supplier and set a checkmark to that Parts to which want to add a supplier. To complete click on “Save”




## 13.3 Open Requisition Notes

Here you have the opportunity to see all open requisitions.

The Open Requisition Notes are grouped into Servicecaserelated and Common Requisitions. Click on the "Information “ icon, to get the details of the requisition.



Index: Open Requisition Notes

Servicecaserelated [18]

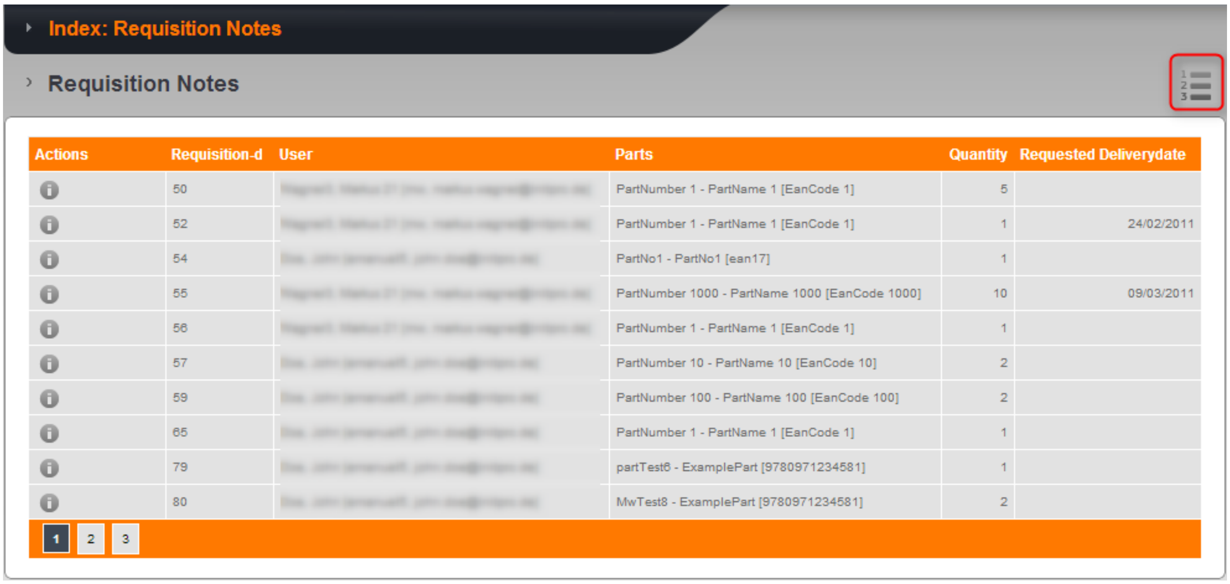
| Actions | User | Parts | Quantity | Servicecase | created | Requested Deliverydate | Booked | Reserved | Available | Ordered | Quantity open |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Doe, John [emanuel5, john.doe@initpro.de] | partTest6 - ExamplePart [9780971234581] | 1 | case-00062 | 23/08/2012 10:14 | | 0 | 0 | 0 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 1 | case-00086 | 11/06/2012 09:39 | | 0 | 0 | 1 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 1 | case-00080 | 23/04/2012 11:07 | | 0 | 0 | 1 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 1 | case-00077 | 23/04/2012 10:13 | | 0 | 0 | 1 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 2 | ABC123 | 12/04/2012 14:11 | | 0 | 0 | 1 | 0 | 2 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 8 | ABC123 | 12/04/2012 13:43 | | 0 | 0 | 1 | 0 | 8 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 10 | ABC123 | 12/04/2012 13:41 | | 0 | 0 | 1 | 0 | 10 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 1 | ABC123 | 12/04/2012 13:23 | | 0 | 0 | 1 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | MwTest4 - ExamplePart [9780971234581] | 3 | case-00062 | 20/06/2011 10:40 | | 0 | 0 | 0 | 0 | 3 |
| | Doe, John [emanuel5, john.doe@initpro.de] | partTest1 - ExamplePart [9780971234581] | 2 | case-00062 | 20/06/2011 10:39 | | 0 | 0 | 10 | 0 | 2 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 12 | case-00062 | 17/06/2011 09:49 | | 0 | 0 | 1 | 0 | 12 |
| | Doe, John [emanuel5, john.doe@initpro.de] | partTest1 - ExamplePart [9780971234581] | 1 | case-00013 | 15/06/2011 15:51 | | 0 | 0 | 10 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | MwTest8 - ExamplePart [9780971234581] | 2 | case-00035 | 24/05/2011 16:52 | | 0 | 0 | 0 | 0 | 2 |
| | Doe, John [emanuel5, john.doe@initpro.de] | partTest6 - ExamplePart [9780971234581] | 1 | case-00035 | 24/05/2011 16:51 | | 0 | 0 | 0 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNumber 1 - PartName 1 [EanCode 1] | 1 | case-00022 | 29/04/2011 16:10 | | 0 | 0 | 0 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNumber 100 - PartName 100 [EanCode 100] | 2 | ABC123 | 14/04/2011 18:37 | | 0 | 0 | 0 | 0 | 2 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNumber 10 - PartName 10 [EanCode 10] | 2 | ABC123 | 15/03/2011 14:09 | | 0 | 0 | 0 | 0 | 2 |
| | Doe, John [emanuel5, john.doe@initpro.de] | PartNo1 - PartNo1 [ean17] | 1 | ABC123 | 04/03/2011 10:19 | | 0 | 0 | 1 | 0 | 1 |

Common [11]

| Actions | User | Parts | Quantity | Servicecase | created | Requested Deliverydate | Booked | Reserved | Available | Ordered | Quantity open |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Doe, John [emanuel5, john.doe@initpro.de] | partTest1 - ExamplePart [9780971234581] | 10 | no | 28/12/2012 01:07 | 28/12/2012 | 0 | 0 | 10 | 0 | 10 |
| | Doe, John [emanuel5, john.doe@initpro.de] | MwTest97 - ExamplePart [9780971234581] | 12 | no | 21/12/2012 02:25 | 21/12/2012 | 0 | 0 | 27 | 10 | 12 |
| | Doe, John [emanuel5, john.doe@initpro.de] | MwTest9 - ExamplePart [9780971234581] | 10 | no | 21/12/2012 02:23 | | 0 | 0 | 0 | 0 | 10 |
| | Doe, John [emanuel5, john.doe@initpro.de] | MwTest97 - ExamplePart [9780971234581] | 1,000 | no | 21/12/2012 02:20 | 21/12/2012 | 0 | 0 | 27 | 10 | 1,000 |
| | Wagner3, Markus 21 [mw, markus.wagner@initpro.de] | MwTest97 - ExamplePart [9780971234581] | 1 | no | 08/06/2011 10:11 | | 0 | 0 | 27 | 10 | 1 |
| | Wagner3, Markus 21 [mw, markus.wagner@initpro.de] | partTest6 - ExamplePart [9780971234581] | 1 | no | 08/06/2011 09:59 | | 0 | 0 | 0 | 0 | 1 |
| | Doe, John [emanuel5, john.doe@initpro.de] | partTest6 - ExamplePart [9780971234581] | 1 | no | 08/06/2011 09:58 | | 0 | 0 | 0 | 0 | 1 |

## 13.4 Requisition Notes

Under "Procurement - Requisition Notes" you will find all of the Requisition Notes. Again you have the option to create a new requisition. Just click on the "Requesting" icon. To learn more about the requisition, click on the "<u>Information</u>" icon in the "<u>Actions</u>" column.



Index: Requisition Notes

Requisition Notes

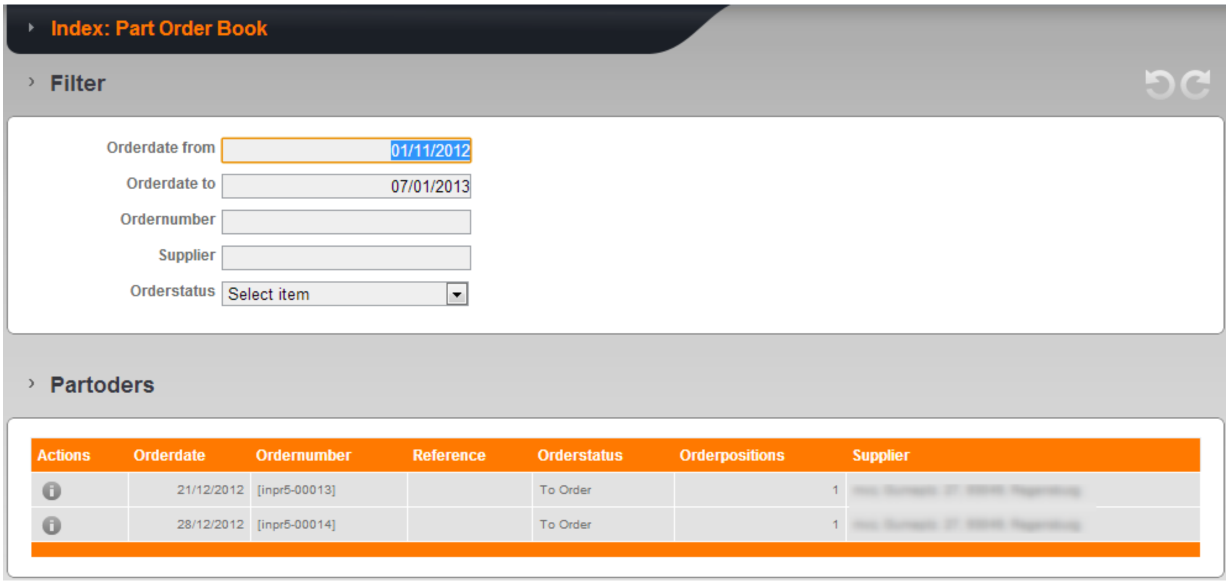
| Actions | Requisition-d | User | Parts | Quantity | Requested Deliverydate |
|---|---|---|---|---|---|
| | 50 | [illegible] | PartNumber 1 - PartName 1 [EanCode 1] | 5 | |
| | 52 | [illegible] | PartNumber 1 - PartName 1 [EanCode 1] | 1 | 24/02/2011 |
| | 54 | [illegible] | PartNo1 - PartNo1 [ean17] | 1 | |
| | 55 | [illegible] | PartNumber 1000 - PartName 1000 [EanCode 1000] | 10 | 09/03/2011 |
| | 56 | [illegible] | PartNumber 1 - PartName 1 [EanCode 1] | 1 | |
| | 57 | [illegible] | PartNumber 10 - PartName 10 [EanCode 10] | 2 | |
| | 59 | [illegible] | PartNumber 100 - PartName 100 [EanCode 100] | 2 | |
| | 65 | [illegible] | PartNumber 1 - PartName 1 [EanCode 1] | 1 | |
| | 79 | [illegible] | partTest6 - ExamplePart [9780971234581] | 1 | |
| | 80 | [illegible] | MwTest8 - ExamplePart [9780971234581] | 2 | |

1 2 3

## 13.5 Part Order Book

Here you will see a list of your Part Orders.

Use the filters under "**Purchasing - Part Order Book**" in order to find the desired Part order. Click on the "<u>Information</u>" icon in the "<u>Actions</u>" column to get the details of the order.



Index: Part Order Book

Filter

Orderdate from 01/11/2012
Orderdate to 07/01/2013
Ordernumber
Supplier
Orderstatus Select item

Partoders

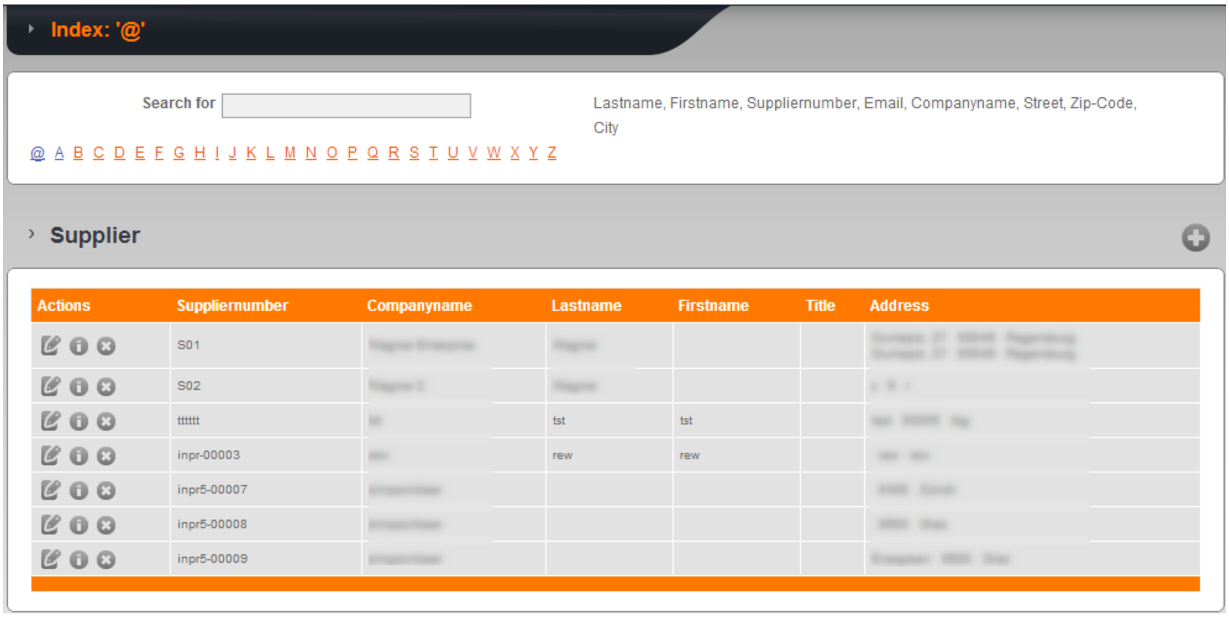
| Actions | Orderdate | Ordernumber | Reference | Orderstatus | Orderpositions | Supplier |
|---|---|---|---|---|---|---|
| | 21/12/2012 | [inpr5-00013] | | To Order | 1 | [illegible] |
| | 28/12/2012 | [inpr5-00014] | | To Order | 1 | [illegible] |

## 13.6 Supplier

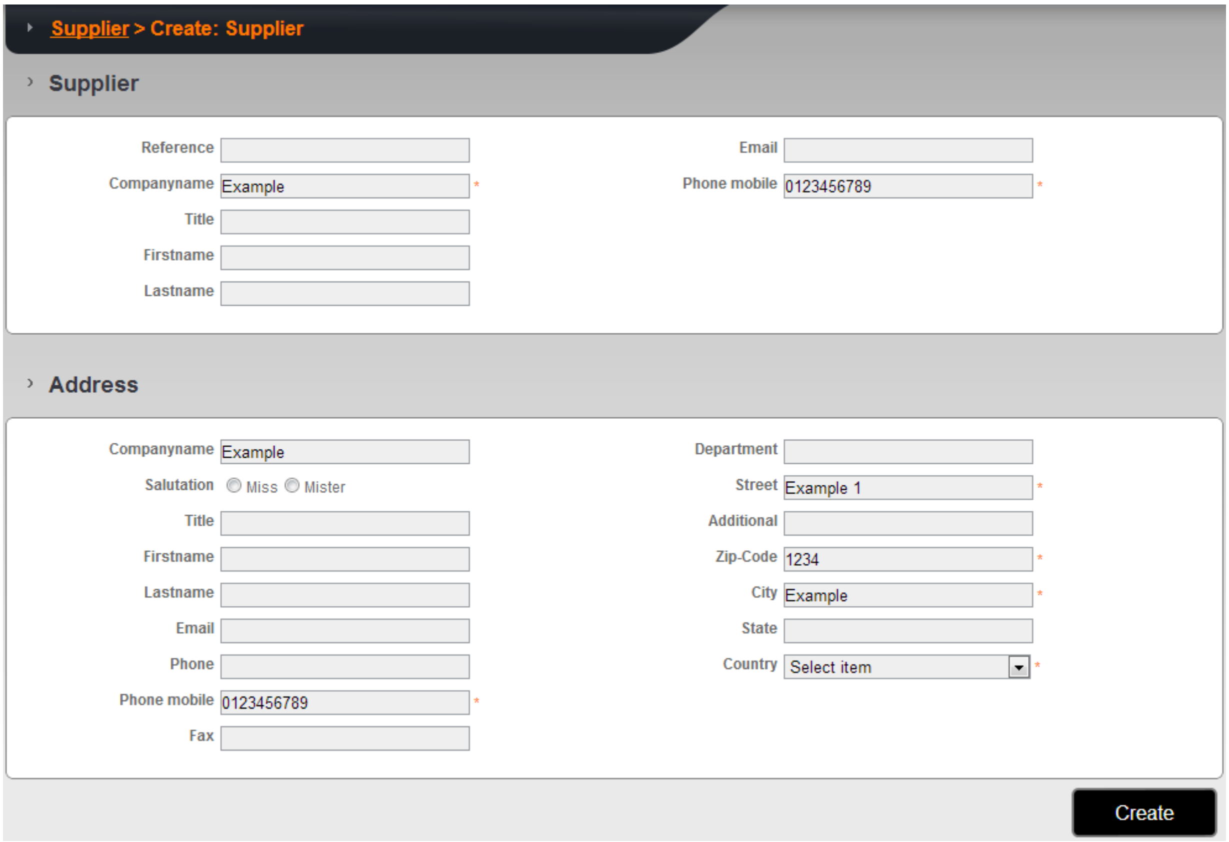
Here is the data set of your Suppliers.

Already registered suppliers can be searched under "**Purchasing - Supplier**". The search is performed by entering the company name (search also accepts Lastname, Firstname, Suppliernumber, Email, Street, Zip-Code, City) or by using the alphabetical index. The search

is done by clicking on the letter that corresponds to the first letter of the last name / company name. By clicking on the @ sign, all registered suppliers are listed.




To add a new Supplier, click on the “add” icon. Now enter the Informations of the supplier and click on "Create".




To delete a Supplier, click on the “Delete” icon in the "Actions" column. To learn the details of a Supplier, click on the “Details” icon in the "Actions" column. To edit a Supplier, click on the “Edit” icon in the “Actions” column. By clicking on the “Edit” icon you can edit the Master

record and Invoice of the Supplier and add Contact or Delivery Information (for that click on the “Add” icon.